JIDS User Manual

ICJO Users

Interstate Commission for Juveniles

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Logging In

The JIDS system is located at **https://JIDS.juvenilecompact.org**.
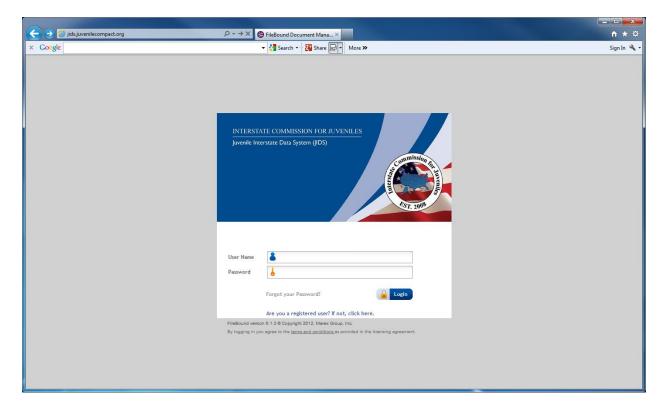
*Note: if this is your first time logging in to JIDS, you must complete the User Agreement and Privacy Policy. Go to the **First Time Log In/Activating Your User Account** section on page 8 for instructions on how to proceed.*

1. Open JIDS in your browser by entering **https://JIDS.juvenilecompact.org** in your browser's address bar.
   Note: Google Chrome browser does not work with JIDS.
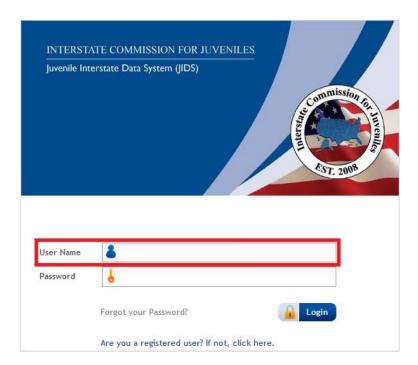
2. You will be brought to the log in window.
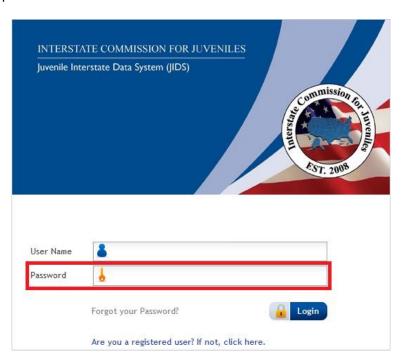
3. Enter your user name into the **User Name** field.
   Note: your user name is your email address.

4. Enter your password into the **Password** field.

5. Click **Login**.

INTERSTATE COMMISSION FOR JUVENILES

Juvenile Interstate Data System (JIDS)

User Name	
Password	

Forgot your Password?

Login

Are you a registered user? If not, click here.

6. You will be logged into the system and will be brought to your home screen.

First Time Login/Activating Your User Account

Upon your first visit to JIDS, you must activate your user account by reading the User Acceptance Agreement and Privacy Policy, and filling out the User Acceptance Agreement form.

Note: You will <u>not</u> be able to sign in to JIDS until you fill out the User Acceptance Agreement form.

1. On your log in screen, select **"Are you a registered user? If not, click here."**

2. You will be brought to a page where you must authenticate your user name to continue. Enter your user name in the **User Name** field and click **Continue**.
   Note: Your JIDS user name will always be your email address.
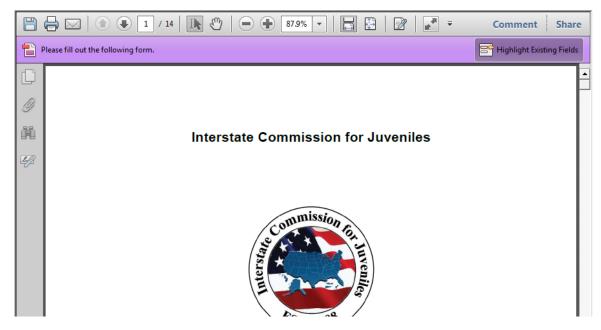
3. You will be brought to the User Acceptance Agreement page.
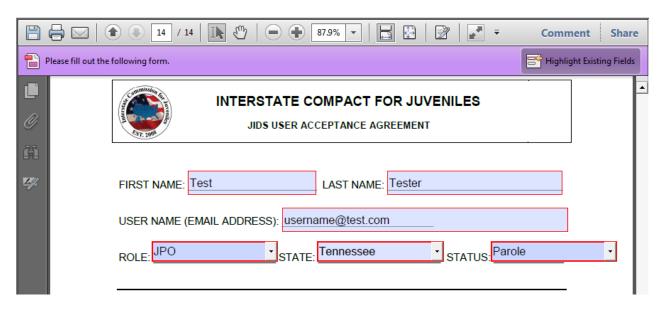
JIDS USER ACCEPTANCE AGREEMENT

Please review and complete the agreement below. Click Submit at the end of the form to activate your account.
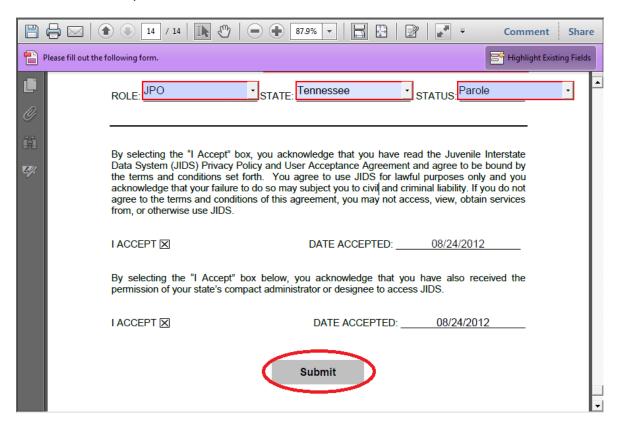
(Print or save a copy for your records prior to submission, if desired.)

a. Read the User Acceptance Agreement and Privacy Policy.
b. Complete the e-form at the end of the agreement (pg. 14) by inserting your information in each of the fields.

c. When you are finished, click the **Submit** button at the bottom of the e-form.

d. A notice will appear, alerting you that your information was submitted successfully.

JIDS USER ACCEPTANCE AGREEMENT

Please review and complete the agreement below. Click Submit at the end of the form to activate your account.

(Print or save a copy for your records prior to submission, if desired.)
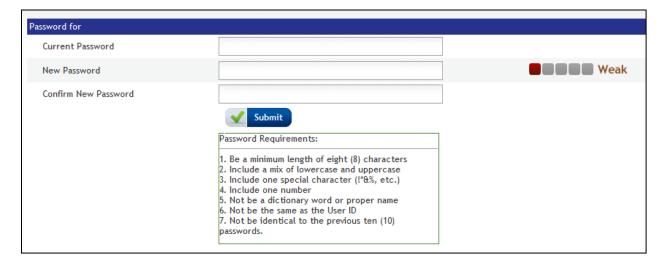
Your User Acceptance Agreement has been successfully submitted.

Within 5 minutes you should receive an email confirming your account has been activated and you will be able to log in to JIDS. If you do not receive an email, contact your state compact administrator for assistance.

4. Within 5 minutes of clicking Submit you should receive an email letting you know you can now sign in to JIDS.

Your JIDS login has been activated

JIDS@juvenilecompact.org
Sent: Mon 10/15/2012 11:33 AM
To: username@test.com

Please proceed to the JIDS login screen for your first login.

Username (email address): username@test.com
Role: JPO
State: Tennessee
Status: Parole

5. Return to the log in screen and sign into JIDS.
    a. You should successfully log in and be forced to change your password.

Password for

Current Password		
New Password		▪▪▪▪▪ Weak
Confirm New Password		

Submit

Password Requirements:

1. Be a minimum length of eight (8) characters
2. Include a mix of lowercase and uppercase
3. Include one special character (!*&%, etc.)
4. Include one number
5. Not be a dictionary word or proper name
6. Not be the same as the User ID
7. Not be identical to the previous ten (10) passwords.

Password Requirements

JIDS has specific password requirements for its users. In order to successfully save, your password must:

1. Be a minimum length of eight (8) characters
2. Include a mix of lowercase and uppercase
3. Include one special character (!*&%, etc.)
4. Include one number
5. Not be a dictionary word or proper name
6. Not be the same as the User ID
7. Not be identical to the previous ten (10) passwords.
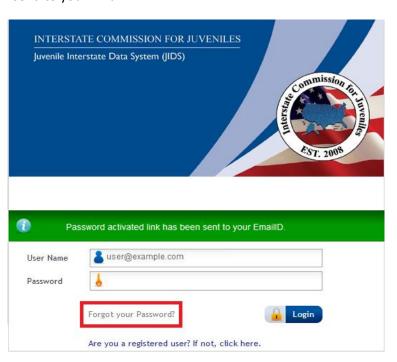
Forgot Password

If you forget your password, you can reset it yourself by doing the following:
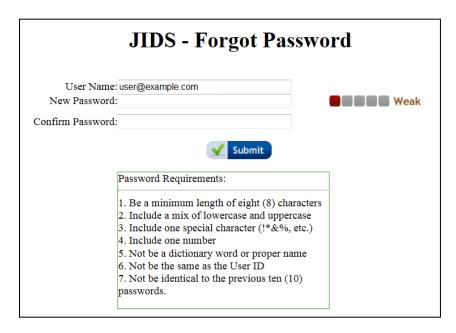
1. On the JIDS log in screen, enter your user name into the **User Name** field.
2. Select **Forgot your Password?**

3. Your screen should refresh and you should see a green banner that reads "Password activated link has been send to your EmailID".

4. You should receive an email entitled "**Forgot Password confirmation link,**" which includes a link to reset your password. Click on the link in the email.
5. The link should open the page shown below. Enter in a new password that fits the password requirements and click **Submit**.

JIDS - Forgot Password

User Name: user@example.com
New Password:
Confirm Password:

■■■■■ Weak

✔ Submit

Password Requirements:

1. Be a minimum length of eight (8) characters
2. Include a mix of lowercase and uppercase
3. Include one special character (!*&%, etc.)
4. Include one number
5. Not be a dictionary word or proper name
6. Not be the same as the User ID
7. Not be identical to the previous ten (10) passwords.

6. Upon clicking Submit, you should be redirected to the JIDS login screen. You should also receive an email titled "**JIDS Password Reset Notification**" to let you know that your password was successfully changed.
7. On the log in screen, enter your username and the new password you just created and click **Login**. You should be able to log into the JIDS system successfully.
   Note: The "Forgot your Password" link will not work correctly if your password is expired.

INTERSTATE COMMISSION FOR JUVENILES
Juvenile Interstate Data System (JIDS)

Interstate Commission for Juveniles
EST. 2008

User Name 👤 user@example.com

Password 🔑 ••••••••••••

Forgot your Password? 🔒 Login

Are you a registered user? If not, click here.

Security

There are three user roles in the JIDS system: Compact Office Administrator (ICJO), Field Office Supervisor (JPS), and Field Office User (JPO). Each user in JIDS will be part of a group associated with one of these roles. Your rights in JIDS are dependent on which role you are. Below is a matrix of the three roles and their respective system rights.
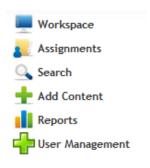
Group Rights		**Group Name**		
		Compact Office Administrator (ICJO)	*Field Office Supervisor (JPS)*	*Field Office User (JPO)*
Search Files	This allows a user to search files based on any of the index values defined in the JIDS project.	X	X	X
File Add	This allows a user to add files to the JIDS system.	X	X	X
File Edit	This allows a user to edit existing files in the JIDS system. A user will only be able to edit the files they have an interest in.	X	X	X
File Delete	This allows a user to delete a file. Deleting a file will also delete any documents that are contained within the file.	X		
Document Viewing	This allows a user to view documents for a file. A user will only be able to view the documents of a file they have an interest in.	X	X	X
Document Printing	This allows a user to print documents from the document viewer.	X	X	X
Document Emailing	This allows a user to attach a document to an e-mail message from within the viewer.	X	X	X
Document Exporting	This allows a user to export (save) a copy of a document outside of JIDS. The original document remains in JIDS.	X		
Document Editing	This allows a user to edit documents within the document viewer. This can include making changes to an e-form, burning in annotations, rotating documents, replacing documents, moving documents within the tree, moving documents to different dividers and separators, and renaming dividers and separators.	X	X	X
Document Deleting	This allows a user to delete individual documents from an existing file.	X		
Use Annotations (no saving)	This allows a user to annotate an image. The users can print, the image(s) with the annotations but cannot permanently save them.	X	X	
Use Annotations (with saving)	This allows all the same ability as above, but the user can save the annotations permanently as a mask over the image. The original image is not modified.	X		

Show/Hide Annotations	This allows a user to toggle between showing and hiding the annotations regardless of their ability to edit or save them.	X	X	
Print/View Reports	This allows a user to print project-based reports.	X		
Allow Workflow Initiation	This allows a user to start a document down a workflow route.	X	X	X
Workflow Reports	This allows a person to generate and view workflow reports.	X	X	X
JIDS Custom Reports	This allows a person to generate and view JIDS Custom Reports	X	X	X

Main Interface Navigation

Navigation Panel

On the left hand side of your screen, you should see the JIDS Navigation Panel.

- **Workspace -**
  JIDS provides a workspace for faster access to projects, files, and documents. The workspace is customizable by users and can be organized to meet the needs of the individual user.
    To edit your Workspace:
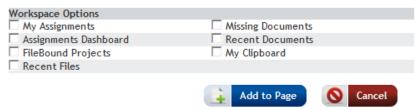
    1. Select the Workspace icon.

    2. On the Workspace page, click .
       The Workspace options window opens.
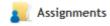
    3. Select the sections that you would like to be visible on your **Workspace** page.
    4. Click .
       Only your selections will be displayed in the Workspace.

- **Assignments** - **Assignments**

  The **Global Assignments** page shows a list of all documents that are assigned to you across all Workflows. These documents are assigned to your state and waiting for you to take an action.

- **Search** - **Search**

  You can search for juvenile case files located within JIDS by using the specified index field values.

  Project Search

Project	JIDS ▼
Juvenile's First Name	[ ] Options
Juvenile's Last Name	[ ]
DOB	[ ] to [ ]
Race	[▼]
Sex	[▼]
Status	[▼]
Type	[▼]
Sex Related Offense?	[▼]
Sending State Compact Office Assign	[ ]
Receiving State Compact Office Assign	[ ]
JIDS #	[ ] to [ ]
Date File Entered	[ ] to [ ]
Minimum Parole/Probation Expiration Date	[ ] to [ ]
Maximum Parole/Probation Expiration Date	[ ] to [ ]
To (Receiving State or Holding State)	[▼]
From (Sending State or Home/Demanding State)	[▼]
Case Status	[▼]
Case Closure Date	[ ] to [ ]
Workflow Status	[▼]

- **Add Content** - **Add Content**

  The **Add Content** icon brings you to the **File Entry** page, which allows you to create a new juvenile case file in JIDS.

- **Reports** - **Reports**

  The **Reports** icon allows you to generate a variety of reports measuring data in JIDS, such as compliance, status of files in workflow, and total case load.

- **User Management -** **User Management**

  Note: User Management is available only to ICJO users.

The **User Management** icon allows you to manage the users in your state. You can create new users, edit user information, and delete users.

Toolbar

At the top of your screen, you should see the JIDS toolbar.

- **Search -**
  The **Search** section in your toolbar allows you to do a quick search by the juvenile's last name.

- **Last -**
  Selecting the **Last** button will bring you to the search results screen for the last item you searched for.

- **User Preferences -**
  The **User Preferences** icon allows you to edit several different user preferences, such as changing your password or email.

- **Help -**
  The Help icon redirects you to the JIDS Helpdesk page, where you access training materials, find answers to frequently asked questions, and submit support tickets.
  Note: Only ICJO users may submit support tickets.

- **Logout -**
  Select the **Logout** button to end your JIDS session and return to the log in screen.

Search Results Screen
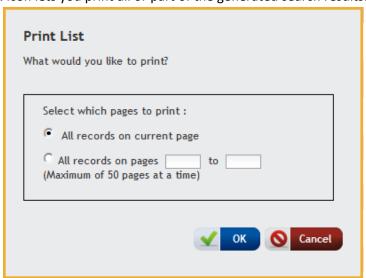
Search Results

Found XX File(s) in JIDS

- **Refresh -**
  The **Refresh** icon resubmits the search parameters the user specified on the **Search** screen.

- **Search Grid -**
  The **Search Grid** icon allows you to narrow down your search results by performing an additional search on your results.

- **Print Grid -**
  The **Print Grid** icon lets you print all or part of the generated search results.

Print List

What would you like to print?

Select which pages to print :

○ All records on current page

○ All records on pages _____ to _____
(Maximum of 50 pages at a time)

✓ OK   ⊘ Cancel

- **Export -**
  The **Export** icon lets you export all or part of the generated search results to an Excel spreadsheet.

Export List

What would you like to export?

Select which pages to export :

◉ All records on current page

◯ All records on pages [   ] to [   ]
(Maximum of 50 pages at a time)

[✔ OK] [🚫 Cancel]

- **Navigation -**
The **Navigation** at the bottom of the search results allows you to toggle through your search results.

Icon	Name	Description
⏮	Show First Page	Displays the first **Search Result** page.
⏪	Show Pre-vious Page	Displays the previous **Search Result** page.
Page 2	Select Page	Enter the page number in the **Select Page** box to view a particular page.
⏩	Show Next Page	Displays the next **Search Result** page.
⏭	Show Last Page	Displays the last **Search Result** page.

Assignments Page

- **Refresh -**

  The **Refresh** icon resubmits the page and looks for new assignments or removes assignments you have addressed.

- **Search Grid -**

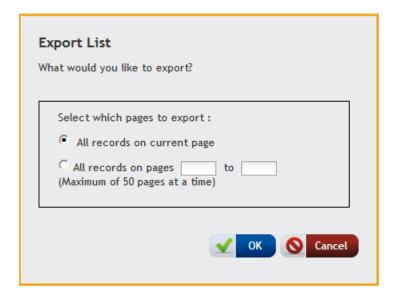 The **Search Grid** icon allows you to narrow down your assignments by performing a search within the assignments page.

- **Print Grid -**

  The **Print Grid** icon lets you print all or part of the assignments on your page.

Print List

What would you like to print?

Select which pages to print :

◉ All records on current page

◯ All records on pages _____ to _____
(Maximum of 50 pages at a time)

✔ OK   🚫 Cancel

- **Export -**

  The **Export** icon lets you export all or part of the assignments on your page to an Excel spreadsheet.

File Details Page

Add Content—File Detail

- **View Document -**
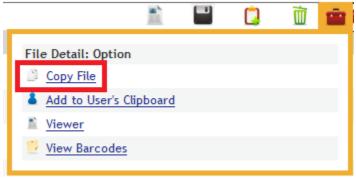 Select the **View Document** icon to open the juvenile's file in the Web Viewer.
  Note: A user may only view a juvenile's file for which their state has interest.

- **Save File -**
  Click the **Save File** icon to save any changes you make to the juvenile's file details.

- **Delete File -**
  Note: *Deleting a file is only available to ICJO users.*
  The **Delete File** icon removes the case file from JIDS.

- **Options -**
  Select the **Options** icon to copy file details for a juvenile.
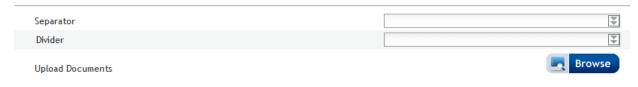
File Entry Page

Options: ⊙ File Entry ○ Upload Documents ○ Generate E-Form

- **File Entry -** ⊙ File Entry
  The **File Entry** button creates a new juvenile case file.

- **Upload Documents -** ⊙ Upload Documents
  The **Upload Documents** button creates a new juvenile case file and allows you to add a document to the file.

Other Options

Separator	
Divider	

Upload Documents   Browse

- **Generate E-form -** ⊙ Generate E-Form
  The **Generate E-form** button creates a new juvenile case file and generates a blank e-form or e-form process for the file.

Other Options

Select E-Form:	
	OR
Select E-Form Process:	

- **Save -** 💾 Save
  The **Save** icon saves the information entered in the fields and creates a new juvenile case file. When the page refreshes, you are brought to the **File Details** page for the case.

- **Save and Add Another -** 💾 Save and Add Another
  The **Save and Add Another** icon saves the information entered in the fields and creates a new juvenile case file. When the page refreshes, you remain on the **File Entry** page and can create a new juvenile case file.
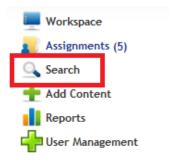
- **Cancel** -

  The **Cancel** icon does not save any of the information you enter in the fields. When the page refreshes, you are brought to your home screen.
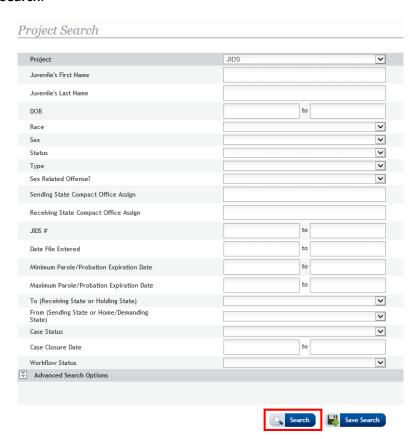
Searching for a Juvenile File

There are multiple ways in which you can search for a juvenile file.

Searching from the Search Screen

1. Select **Search** on the left hand navigation.

2. Enter information on the juvenile file you are looking for into any combination of the data fields and click **Search**.

*Note: if you enter no search criteria and select the **Search** button, JIDS will perform an open search and return every result in the system.*

3. The page will refresh and your results will display.

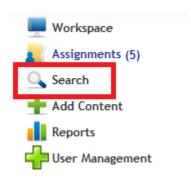a. Select the juvenile file you wish to open, and you will be brought to the juvenile's **File Details** page.

b. Select the viewer icon ( ) next to the juvenile file you wish to open the **Web Viewer** to see the juvenile's documents.
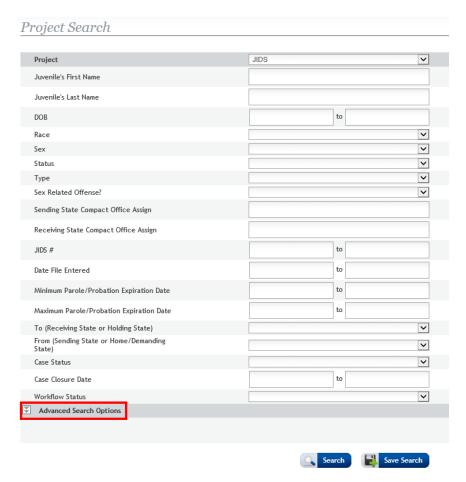
Advanced Search Options
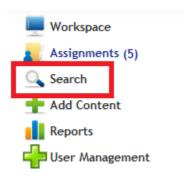
1. Select **Search** on the left hand navigation.

2. Below the standard search fields are **Advanced Search Options**. Click the arrow to view them.

3. Enter information on the juvenile file you are looking for into any combination of standard and advanced search fields and click **Search**.
4. The page will refresh and your results will display.
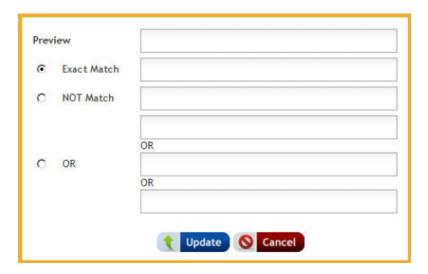
Additional Search Options

1. Select **Search** on the left hand navigation.

2. When entering search data into text fields, select **Options** for ways to narrow down your results further.

3. A screen will open, allowing you to perform searches via **Exact Match**, **Not Match** and **Or**.

    a. **Exact Match** can be performed by selecting the Exact Match radio button and entering your search criteria in the field next to it. Choosing this option will only return results that match your search criteria exactly.

    b. **NOT Match** can be performed by selecting the NOT Match radio button and entering your search criteria in the field next to it. Choosing this option will only return results that do not match your search criteria.

c. **OR** can be performed by selecting the OR radio button and entering your search criteria in any or all of the three fields next to it. Choosing this option will only return results that match one of the search criteria you have included.
4. In addition to the Options window, these same searches can be performed by using certain distinct variables in your regular search window. See below for descriptions and examples of how to use these variables in JIDS.
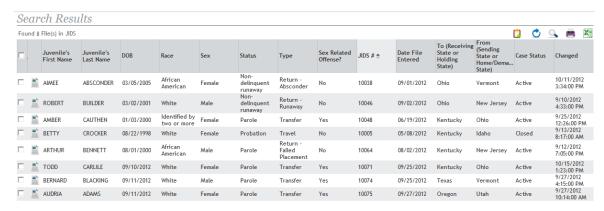
Var-iable	Func-tion	Description
%	Wildcard	This variable performs a wildcard search and retrieves all the files. It is useful for both alpha and numerical field values. When used at the beginning of the search criteria the index field will be searched for the entered criteria any-where within the index field, not just at the beginning
~	Exact Search	This variable performs an exact search, when you place it at the end of the search string. For example "Brian~" retrieves all the records having the exact value "Brian". It is also use-ful for both alpha and numerical values.
!	Excludes	This variable excludes the search string from the search result, when you place it in the beginning. For example "!Brian" retrieves all the files that do not begin with without "Brian".
		Or	This variable when placed between search criteria will allow JIDS to perform an "OR" search.

Variable	Search Criteria	Returned Result
%	%	All Files Stored in JIDS
	John	Any File Starting with "John"
%	%Johnson	Any File Containing "Johnson" in the Field
!	!107	Any File NOT Starting with "107"
~	107~	All Files EXACTLY "107"
~	~	All Files that are Blank in that Field
!~	!~	All Files that are NOT Blank in that Field
!%	!%Christy	All Files EXCEPT the files that contain "Christy"
		107634|107721	Any file that contains 107634 or 107721 in that Field

Sorting Search Results

Search results can be sorted by the column names listed at the top of your results page. By default, results are sorted by Juvenile's Last Name. To sort by a different parameter, select the column header.

For example, if you want to sort your search results by JIDS number, select the JIDS # header.

Search Results

Found 8 File(s) in JIDS

	Juvenile's First Name	Juvenile's Last Name	DOB	Race	Sex	Status	Type	Sex Related Offense?	JIDS # ↕	Date File Entered	To (Receiving State or Holding State)	From (Sending State or Home/Dema... State)	Case Status	Changed
	AIMEE	ABSCONDER	03/05/2005	African American	Female	Non-delinquent runaway	Return - Absconder	No	10038	09/01/2012	Ohio	Vermont	Active	10/11/2012 3:34:00 PM
	ROBERT	BUILDER	03/02/2001	White	Male	Non-delinquent runaway	Return - Runaway	No	10046	09/02/2012	Ohio	New Jersey	Active	9/10/2012 4:33:00 PM
	AMBER	CAUTHEN	01/03/2000	Identified by two or more	Female	Parole	Transfer	Yes	10048	06/19/2012	Kentucky	Ohio	Active	9/25/2012 12:26:00 PM
	BETTY	CROCKER	08/22/1998	White	Female	Probation	Travel	No	10005	05/08/2012	Kentucky	Idaho	Closed	9/13/2012 8:17:00 AM
	ARTHUR	BENNETT	08/01/2000	African American	Male	Parole	Return - Failed Placement	No	10064	08/02/2012	Kentucky	New Jersey	Active	9/12/2012 7:05:00 PM
	TODD	CARLILE	09/10/2012	White	Female	Parole	Transfer	Yes	10071	09/25/2012	Kentucky	Ohio	Active	10/15/2012 1:23:00 PM
	BERNARD	BLACKING	09/11/2012	White	Male	Parole	Transfer	Yes	10074	09/25/2012	Texas	Vermont	Active	9/27/2012 4:15:00 PM
	AUDRIA	ADAMS	09/11/2012	White	Female	Parole	Transfer	Yes	10075	09/27/2012	Oregon	Utah	Active	9/27/2012 10:14:00 AM

JIDS Number

Each juvenile file is assigned its own unique JIDS number upon creation. When searching for a specific juvenile file whose JIDS number you know, enter the number into the JIDS number field on the search screen and click **Search**.

File Structure

Each juvenile file in JIDS is its own specific case file. A juvenile may have multiple cases (for example, if they travel to other states frequently), resulting in more than one file for the same juvenile in your search results.

For example, John Doe travels from his home state of Ohio to visit Kentucky to test placement. Three months later, John Doe transfers from his home state of Ohio to Tennessee. These examples would show up as two *separate* case files in the JIDS system, not as one juvenile file.

What You Can View

- Every user in the system can see the file details for all juvenile files in the system regardless of the states involved.
- A user can only see the contents of a juvenile file (documents, etc.) if their state is in either the "To" or "From" field of the file details.
  For example, if you are a user in Kentucky, you can only view a juvenile file's contents if the juvenile file has Kentucky listed as the "To" state or "From" state.

If you need to view the contents of a file that you do not have access to, please contact one of the states that do have access to request them to email you information.

Key and Last Search

The **Key Search Field** is the search field located at the top of your JIDS page. It allows you to do a quick search based on the Juvenile's Last Name.
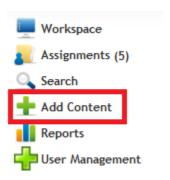

The **Last** button at the top of your JIDS page brings you to the search results of the last search you performed, so that you do not have to enter in the search criteria again.
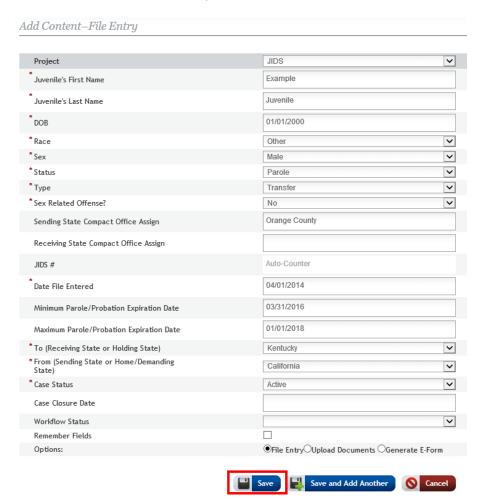
Adding a Juvenile File

To add a juvenile file to JIDS:

1. Select **Add Content** on your left hand navigation.

2. You will be brought to the File Entry page. Enter in the File Details for the juvenile and click **Save**.
   Note: Fields with an asterisk (*) are required.
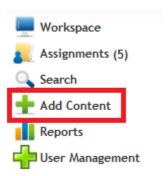
3. The screen will refresh and your juvenile information will be saved.

Remember Fields
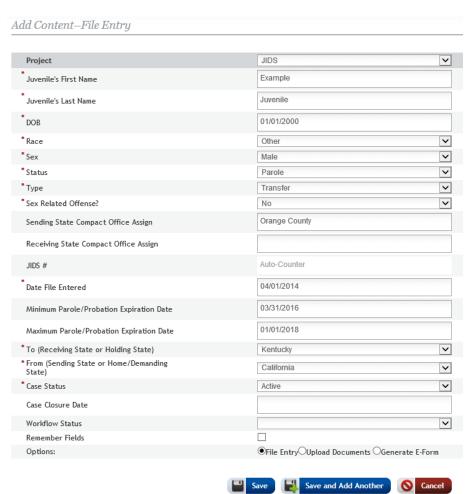
If you are creating multiple juvenile files containing similar information, you can use the **Remember Fields** check box to remember the information you have stored.

To use Remember Fields:

1. Select **Add Content** on your left hand navigation.

2. You will be brought to the File Entry page. Enter in the File Details for your juvenile.
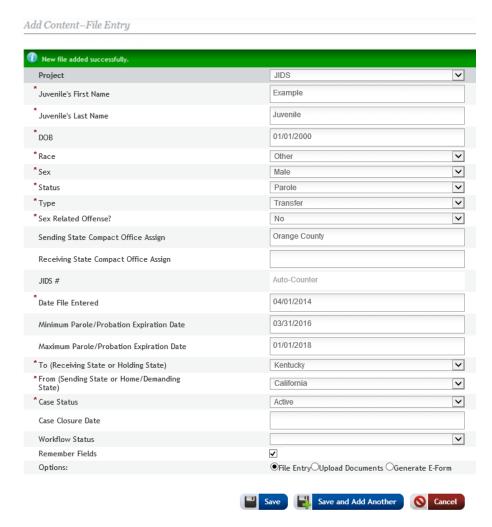
3. Check the **Remember Fields** box.

Add Content—File Entry

Project	JIDS
*Juvenile's First Name	Example
*Juvenile's Last Name	Juvenile
*DOB	01/01/2000
*Race	Other
*Sex	Male
*Status	Parole
*Type	Transfer
*Sex Related Offense?	No
Sending State Compact Office Assign	Orange County
Receiving State Compact Office Assign	
JIDS #	Auto-Counter
*Date File Entered	04/01/2014
Minimum Parole/Probation Expiration Date	03/31/2016
Maximum Parole/Probation Expiration Date	01/01/2018
*To (Receiving State or Holding State)	Kentucky
*From (Sending State or Home/Demanding State)	California
*Case Status	Active
Case Closure Date	
Workflow Status	
Remember Fields	☐
Options:	⦿ File Entry ◯ Upload Documents ◯ Generate E-Form

[Save] [Save and Add Another] [Cancel]

4. Select **Save and Add Another**.

Add Content—File Entry

Project	JIDS
*Juvenile's First Name	Example
*Juvenile's Last Name	Juvenile
*DOB	01/01/2000
*Race	Other
*Sex	Male
*Status	Parole
*Type	Transfer
*Sex Related Offense?	No
Sending State Compact Office Assign	Orange County
Receiving State Compact Office Assign	
JIDS #	Auto-Counter
*Date File Entered	04/01/2014
Minimum Parole/Probation Expiration Date	03/31/2016
Maximum Parole/Probation Expiration Date	01/01/2018
*To (Receiving State or Holding State)	Kentucky
*From (Sending State or Home/Demanding State)	California
*Case Status	Active
Case Closure Date	
Workflow Status	
Remember Fields	☑
Options:	⦿ File Entry ◯ Upload Documents ◯ Generate E-Form

[Save] [Save and Add Another] [Cancel]

5. A green banner will appear at the top of your page, letting you know the juvenile was added. You will remain on the Add Content-File Entry page, and the fields will still be filled out with the information from the previous juvenile. Make any alterations to this data for your new juvenile file, and click **Save**.
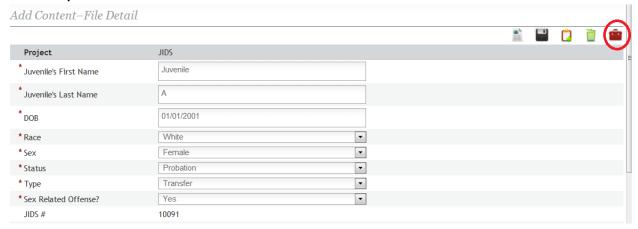
6. The page will refresh and you will be brought to the juvenile's File Details page.

Copying a File's Details to Create a New File
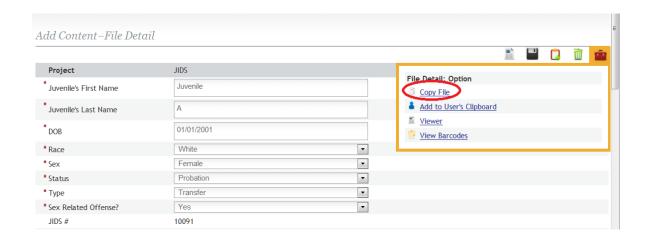
If you are creating a new file for a juvenile that already exists in JIDS (i.e. a second transfer of the same juvenile), you can copy the existing file's details to avoid double data entry.

To copy the file details:
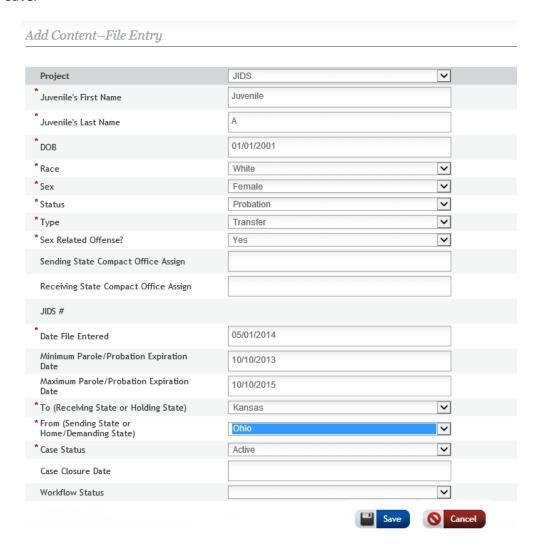
1. Go to the file details page of the existing juvenile that you would like to copy. Click on the **Options** tool box.

2. Click on **Copy File**.

3. The screen will refresh. Make any necessary changes to the new file's detail page and click
   Save.

Add Content—File Entry

Project	JIDS
* Juvenile's First Name	Juvenile
* Juvenile's Last Name	A
* DOB	01/01/2001
* Race	White
* Sex	Female
* Status	Probation
* Type	Transfer
* Sex Related Offense?	Yes
Sending State Compact Office Assign	
Receiving State Compact Office Assign	
JIDS #	
* Date File Entered	05/01/2014
Minimum Parole/Probation Expiration Date	10/10/2013
Maximum Parole/Probation Expiration Date	10/10/2015
* To (Receiving State or Holding State)	Kansas
* From (Sending State or Home/Demanding State)	Ohio
* Case Status	Active
Case Closure Date	
Workflow Status	

Save   Cancel

Viewing a Juvenile's File

To view the contents of a juvenile's file, select the **Viewer** icon ( ) on the top, right hand side of your juvenile's File Detail page.
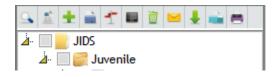
Note: Users are only able to view the contents of files that they have an interest in.

Web Viewer Navigation

Web Viewer Toolbar

When you open a juvenile case file in the Web Viewer, you should see the following buttons at the top, left hand side of the screen.

Note: As a JIDS user, you will not be utilizing all of the displayed buttons. Only the buttons you will be actively using in JIDS are described below.

- **File Search -**
  You can select the **File Search** icon to search for one or more juvenile files. It allows you to open multiple juvenile files in the same **Web Viewer** window (for use in side-by-side comparisons).
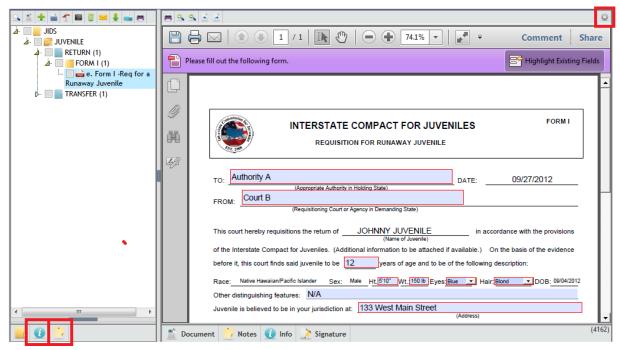
- **Add Document(s) -**
  The **Add Document(s)** icon allows you to add files from your computer or a network location to the juvenile case file. These types of files can include conditions of supervision, petition/arrest reports, and photographs.

- **Workflow -**
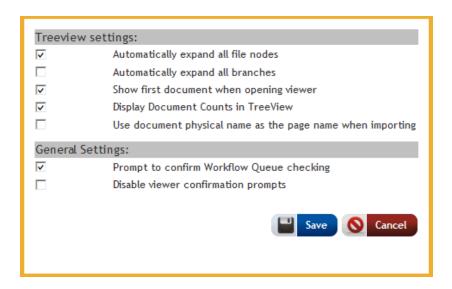
  The **Workflow** icon allows you to route documents displayed in the Web Viewer down a predetermined workflow route.

- **Generate E-form -**

  The **Generate E-form** icon displays a list of all available ICJ forms you can generate in JIDS.

- **Delete Page(s) -**

  Note: Deleting a page is only available to ICJO users.

  The **Delete Page(s)** icon removes the selected documents from the case file.

- **Email Page(s) -**

  The **Email Page(s)** icon attaches the selected documents to an email in your default email client.

Other Web Viewer Icons

- **Web Viewer Settings -**

  Located at the top right hand side of the web viewer window, the **Web Viewer Settings** icon allows you to alter how items are displayed within the Web Viewer.

- **Information -**

  Located in the bottom, left hand side of the Web Viewer window, the **Information** icon displays the file details for the case file you have open in the Web Viewer.

- **Notes -**

  Located in the bottom, left hand side of the Web Viewer window, the **Notes** icon allows you to add and save notes on the juvenile case file you have open in the Web Viewer.

Adobe Toolbar

When you open a PDF document in the Web Viewer, the Adobe Toolbar will appear at the top of the document.

- **Save a copy -**

  The **Save a copy** icon allows you to save a copy of the document you are viewing on to your computer.
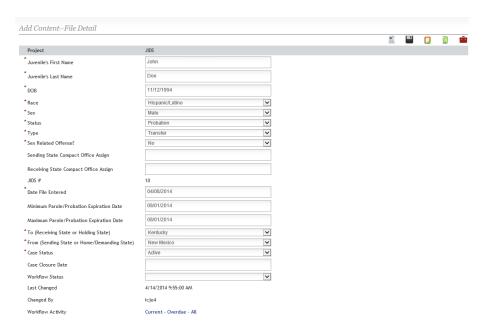
- **Print file -**

  The Print file icon allows you to print a copy of the document you are viewing.

Editing a File

To edit a file:

1. Open the file details of the juvenile file you want to edit.

2. Select the field(s) you want to change and make the necessary edit(s).
   Note: A user will only be able to edit the file details for a juvenile they have interest in.
3. Click the **Save** icon to save your changes.

   a. Select **Continue**.

4. The window will refresh and you will see a green banner at the top of your page, notifying you that your edit was saved successfully.

Add Content—File Detail
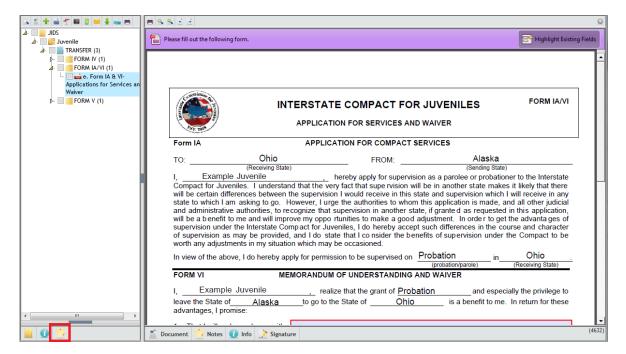
Making Notes on a File
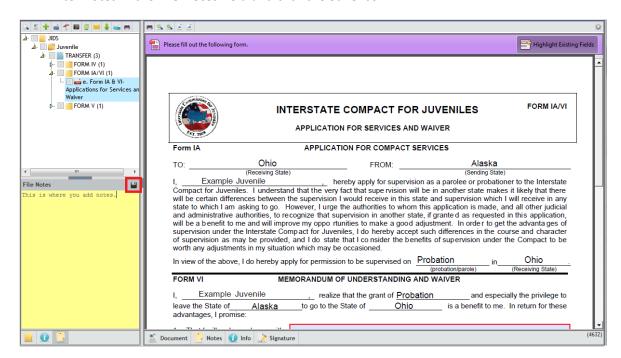
File notes are like a sticky note attached to the file. They are visible to all users that have access to the file, regardless of where it is in a workflow process.

To add notes to a file:
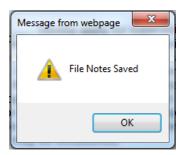
1. Select the **Notes** icon in your web viewer.

2. Enter notes in the **File Notes** field and click the **Save** icon.
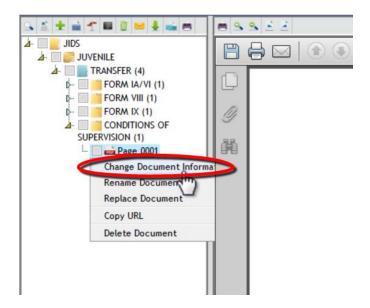
3. You will receive a notification alerting you that your file notes were saved successfully. Click **OK**.

Moving a Document into a New Divider

> *Note*: For the definitions of Separators and Dividers, see the section titled "*Separators and Dividers*."

1. In the web viewer, right click on the document you want to move and select **Change Document Information**.

2. Select the new Divider and/or Separator you would like your document to be filed under. Click **OK**.

3. The viewer will refresh and your document will be placed in the new location.

Separators and Dividers

Separators and **Dividers** are used to sort and categorize the documents within a file. **Separators** consist of broad categories, while **Dividers** are more specific groupings within the Separators.

Deleting a File/Document

Deleting a File

To delete a juvenile file:

1. On the juvenile's file details page, select the **Delete File** icon.

2. Click **Continue** to confirm.
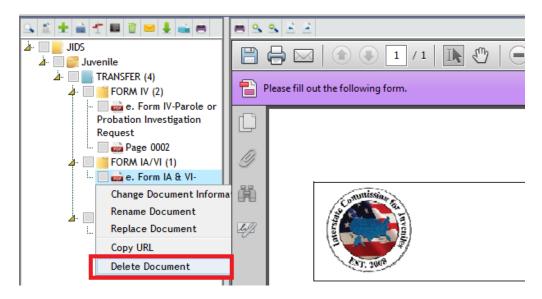
3. The file will delete and you will be brought back to your home screen.
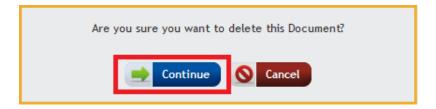
Deleting a Single Document

To delete a document in a juvenile file:
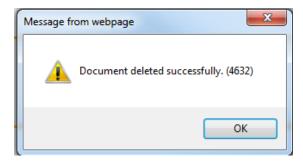
1. Right click on the document you want to delete.
2. Select **Delete Document**.

    a. Select **Continue**.

    b. You will receive a notification that your document was deleted successfully. Click **OK**.
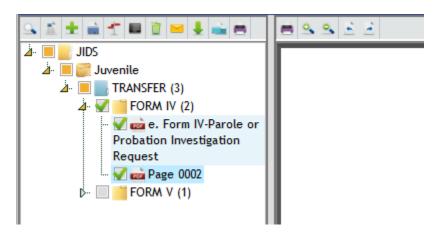
    c. The document viewer will refresh and your deleted document will be removed.
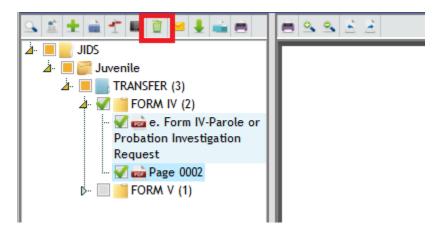
Deleting Multiple Documents

To delete multiple documents in a juvenile file:

1. Select the checkboxes next to the documents you want to delete.

2. Click the **Delete Page(s)** icon.
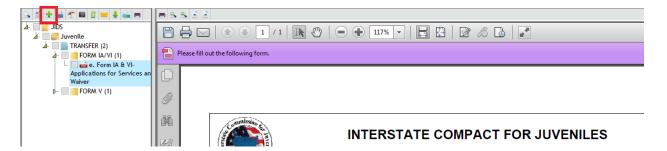
    a. Click **OK** to confirm your delete.

    b. The document viewer will refresh and your deleted documents will be removed.

How to Add Attachments to a File

1. In the web viewer, select **Add Documents** in the top navigation.
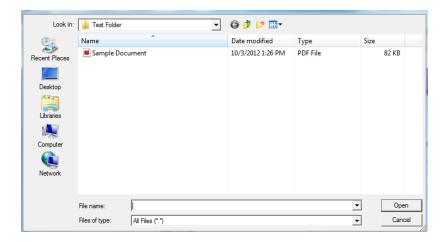
2. Select the **Separator** and **Divider** to file the document under.
   Note: For the definitions of Separators and Dividers, see the section titled "**Separators and Dividers**."
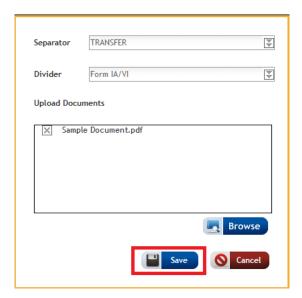
3. Browse and select the document you want to attach.

4. Select **Save** to upload the attachment.

a. The viewer will refresh and your document will be present under the correct Separator and Divider.

File Hierarchy

Each document added to the web viewer will fall under a specific separator and divider. The list below displays what dividers are present under which separators.

Separator: TRANSFER
- Form IV
- Form IA/VI
- Form V
- Form VIII
- Form IX
- Form X
- Order of Adjudication/Commitment
- Conditions of Supervision
- Petition/Arrest Reports
- Risk Assessment
- Safety Plan
- Legal and Social History
- Victim Information
- Photograph of Juvenile
- Other
- Surveillance/Travel Plan
- Victim Notification Supplement Form

Separator: RETURN
- Form I
- Form II
- Form III
- Form A
- Order Setting Hear for the Requisition for Runaway Juvenile
- Petition for Hearing on Requisition for Runaway Juvenile
- Order Setting Hearing for Requisition for Escapee, Absconder, or Accused Delinquent
- Petition for Hearing on the Requisition for Escapee, Absconder, or Accused Delinquent
- Juvenile Rights form for Consent for Voluntary Return of Out of State Juvenile
- Surveillance and Travel Plan

Separator: TRAVEL
- Form VII
- Travel Plan
- Victim Notification Supplement Form

Scanning Attachments

Although JIDS is an electronic system, there are some documents that you will receive in paper format that you will need to scan and upload to the system. These documents may include but are not limited to:
- Signed ICJ forms
- Juvenile medical or school records
- Arrest reports
- Other miscellaneous support documentation that would normally be stored in a juvenile's file

These documents can be scanned using your office's scanning tool – i.e. a document scanner attached to your computer, a multifunctional device (scanner/printer/fax) on a network, etc.

When you scan a document(s), save your scanned documents to a directory on your network or local computer (such as your desktop) where you can easily access them.

It is recommended that you scan your documents in black and white at 200 DPI.   This will help the images remain at a manageable size and will not delay load time once inside JIDS.

After the documents you would like to attach to a file have been scanned, please refer to the **Adding an Attachment to a Juvenile File** section to see how to add documents to a file.

Viewing Your Workload
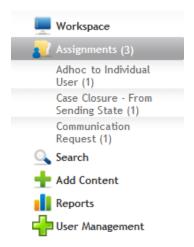
1. To view your workload, select the **Assignments** page on your left hand navigation.
    Tip: The number of items assigned to you will appear in parentheses next to Assignments.

2. You will be brought to your **Global Assignments** page, which displays every item currently assigned to you.

3. On the left hand navigation, you will see a list of the individual workflow routes that currently have items assigned to you.
    Tip: The number of items assigned to you in each individual workflow will appear in parentheses next to the name of the workflow.

4. If you select one of the workflows on the list, you will be brought to a page that lists details describing your assigned items from that specific workflow.

Assignments : Ad hoc to Individual User

1 document(s) assigned to icjo3

			Juvenile's First Name	Juvenile's Last Name	Status	Type	JIDS #	To (Receiving State or Holding State)	From (Sending State or Home/Demanding State)	Workflow Status	Assign... By	Start Date	Step Name
☐	+		ADDISON	AUSER	Probation	Transfer	5065	Kentucky	Virgin Islands		icjo3	11/28/... 2:09:00 PM	Origina...

5. You can sort results on any of these pages by selecting one of the column headers at the top of the page.

*Example of Global Assignments page sorted by **Route**:*

Global Assignments

3 document(s) assigned to icjo4

			Project Name	Route ⬆	Step	Due Date	Details
☐	+		JIDS	Adhoc to Individual User	Originator		Juvenile's Last Name: TEST
☐	+		JIDS	Case Closure - From Sending State	ICJO Receiving		Juvenile's Last Name: CAUTHEN
☐	+		JIDS	Communication Request	ICJO Responder		Juvenile's Last Name: ABSCONDER

*Example of Global Assignments page sorted by **Step**:*

Global Assignments

3 document(s) assigned to icjo4

			Project Name	Route	Step ⬆	Due Date	Details
☐	+		JIDS	Case Closure - From Sending State	ICJO Receiving		Juvenile's Last Name: CAUTHEN
☐	+		JIDS	Communication Request	ICJO Responder		Juvenile's Last Name: ABSCONDER
☐	+		JIDS	Adhoc to Individual User	Originator		Juvenile's Last Name: TEST

6. To view the thumbnail of the document routed to you, select the **Preview** icon ( ).
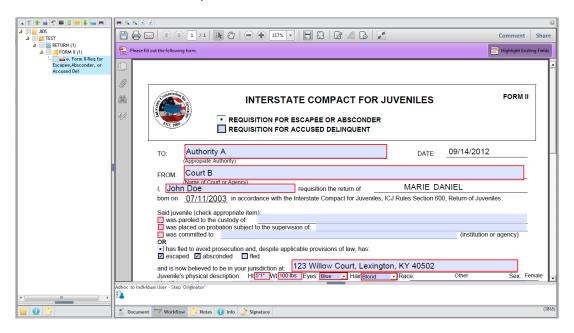
a. A screen will open, displaying the thumbnail image of the document.

7. To open the web viewer for the document routed to you, select the **Viewer** icon ( ).
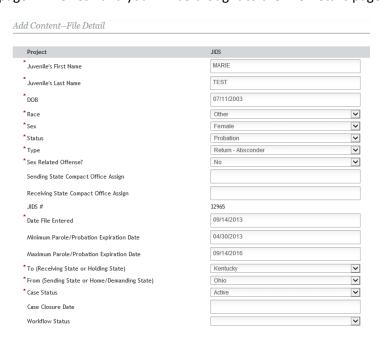
a. The web viewer will open in a new window.

8. To open the full file details page for the document routed to you, select any file details of the assignment routed to you.
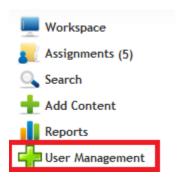
a. The page will refresh and you will be brought to the File Details page for the juvenile file.

Out of Office Procedures

- Set your email program to "Out of Office." The Out of Office Reply you set up will respond to any user who sends you an assignment while you are away to notify them of your absence.

- If you are in a compact office that contains more than one compact administrator for your state: There is no need to take any further action. The items on your Assignments Page should already be on your coworkers' pages, and any incoming assignments will display on all of your Assignments Pages as well.

- If you are in a compact office where you are the only compact administrator for your state:
  - Select the **User Management** icon on your left hand navigation.

  - If the designee is not currently in the JIDS system, add them to your state's ICJO group.
  - If the designee is a field officer in the JIDS system, edit their user information and add them to your state's ICJO group.
  - Any new items that are assigned to your state to work will go to both you and your designee's homepage.

- When you return to the office, remove your Out of Office alert from your email and remove your designee as an ICJO (by either deleting the user or editing their user information back to JPO or JPS).
  *For more information on User Management, see the **Managing Users** section.*
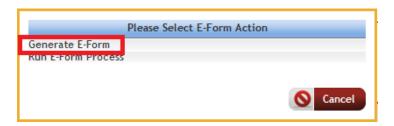
Creating/Completing a Form Electronically

Creating/Completing a Form via the Web Viewer

1. In the web viewer, select the **Generate E-form** icon.
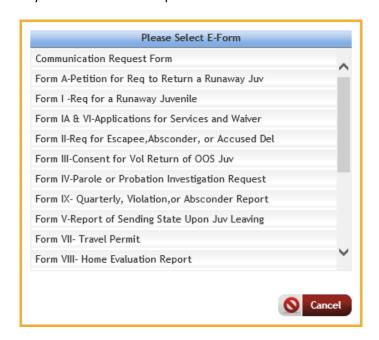
   a. Choose **Generate E-form** from your options.

*Note: For information on E-form Processes, please see the **E-form Processes** section.*

2. Select the e-form you would like to complete.

   a. The window will refresh and a blank copy of your selected e-form will load.
3. Fill out the blank fields of the e-form.

Note: Items outlined in red are required fields. A form cannot be saved unless all required fields have been filled in.

4. When you complete the form, click **Save** at the bottom of the page.
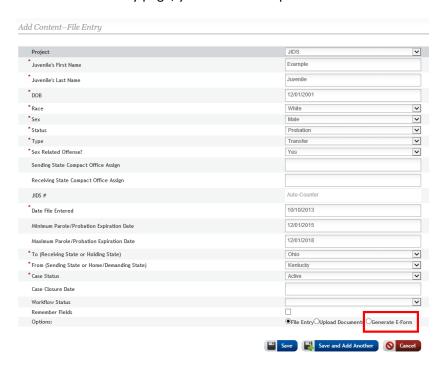
a. The e-form will refresh and your data will be saved.

Creating/Completing a Form via the Add Content-File Entry page

In addition to generating an e-form in the web viewer, you can save time by generating an e-form upon creation of a file.

1. Select **Add Content** from your left hand navigation.
2. Enter in the file details for the juvenile file you wish to create.
3. At the bottom of the file entry page, you have three options. Select **Generate E-form**.

4. Select the E-form or E-form Process you wish to generate, and click **Save**.
   *Note: for information on E-form Processes, please see the **E-form Processes** section.*

5. The information will save and you will be brought to the juvenile's File Details page. When you open the web viewer, blank copies of the e-form(s) you generated will be present in the file.

E-form Processes

When choosing to generate an e-form, you are given the option to run an E-form Process. E-form Processes are predefined "packets" of e-forms. When you select an e-form process, you have the ability to generate multiple blank e-forms.
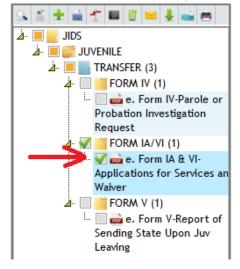
JIDS has two e-form processes. The below list describes which forms are generated when you select each:

- Referral Packet: Form IV, Form IA/VI, and Form V
- Failed Plcmt. Packet: Case Closure Notification, Travel Plan
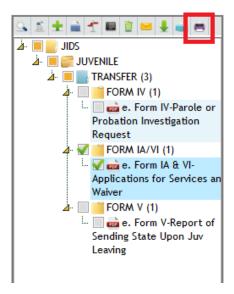
Printing a Form

To print a form:
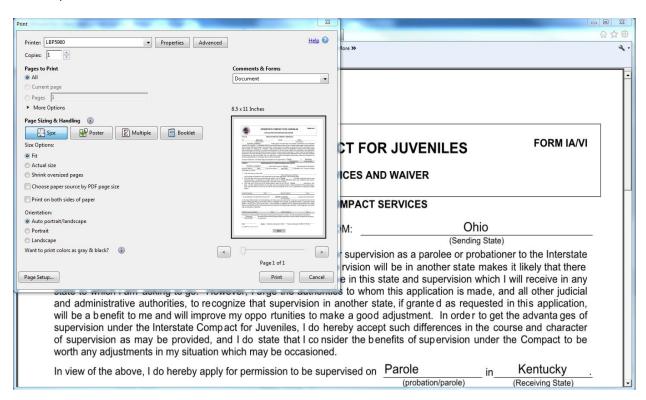
1. In the web viewer, check the boxes next to the form(s) you want to print.

2. Select the **Print Document(s)** icon in the top navigation.

3. A new window will launch containing the document(s) selected and you will be prompted to print.
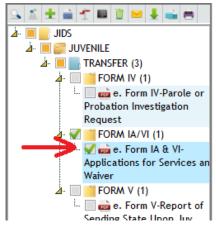
Emailing a Form
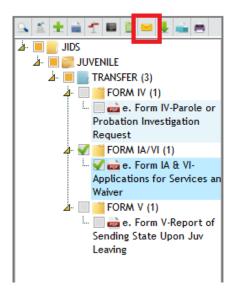
Note: Emailing a form via JIDS only works if you have a default mail client (i.e. Microsoft Outlook) set up on your computer.

To email a form:

1. In the web viewer, check the boxes next to the form(s) you want to email.
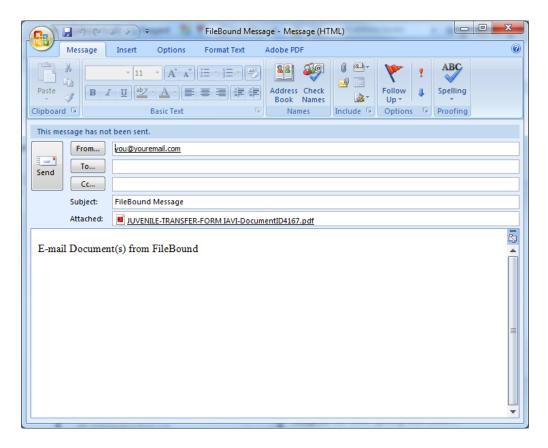
2. Select the Email Page(s) icon in the top navigation.
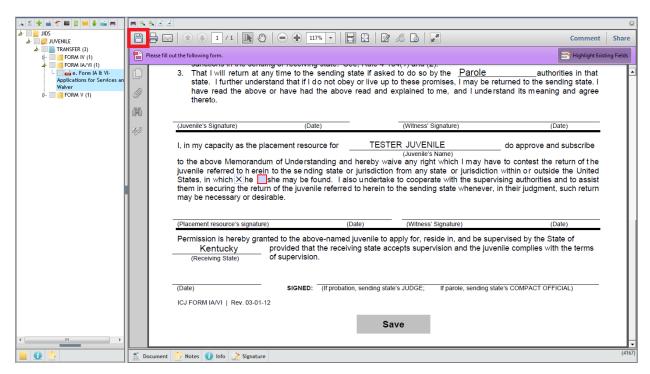
3. Your default email client will launch a draft of a new message, with a copy of the selected document(s) attached. Revise the subject of the email, enter a message, and add recipients as you normally would.
   Tip: If your default mail client does not open a new email draft, make sure your pop up blocker is disabled in your internet browser.

Exporting a Form

1. To export a form, select the **Save a Copy** icon (💾) at the top of the form in your web viewer.

2. Browse out to the location you would like to save your form to, and click **Save**.

*IMPORTANT: If you have made any changes to the form and not clicked the **Save** button at the bottom of the form (**Save**   ), your edits will __not__ be saved on your exported copy of the form.*

Initiating a File Down a Specific Workflow Route

To initiate a file down a workflow:

1. In the document web viewer, select the document you want to route.
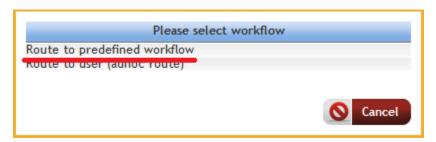
IMPORTANT: The document you choose will be the document that contains all of the workflow task buttons for the entire workflow route. It will also be the first document to load when a user it has been routed to opens the assignment.

Because of this, the document you select should be an e-form related to the workflow you are using. For example, when choosing a Travel Permit workflow, you should route a Form VII-Travel Permit e-form, not a scanned copy of the form or an unrelated Photograph of the Juvenile. Depending on the workflow, the document e-form you choose to route may vary.
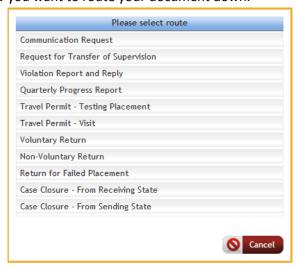
2. Click the **Workflow** icon ( ) in the top navigation.

3. Select **Route to Predefined Workflow** from your options.
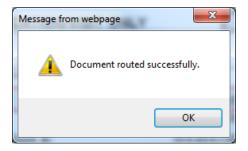
4. Select the workflow you want to route your document down.

a. Enter any notes you would like the first user in the workflow to see, and click **OK**.

b. You will receive a notification that the document was routed successfully.

Note: The first step in any workflow <u>(except for the "Ad Hoc to Individual User" route)</u> is to the state's ICJO users. If you are an ICJO user initiating a workflow, upon clicking OK your web viewer will refresh and you will have task buttons at the bottom of your screen, allowing you to route the document to the next step. If a JPO or JPS user was the one initiating the workflow, upon clicking OK the document will sent to you, the ICJO user.

Workflow Descriptions

Request for Transfer of Supervision

The **Request for Transfer of Supervision** workflow allows for the Sending State's ICJO to request transfer of a juvenile from their state to the Receiving State.

Next, the Receiving State's ICJO will have their field officers do a Home Evaluation, which will be sent back to the Sending State upon completion. The Sending State's ICJO will accept or deny this transfer based upon the decision made by the Receiving State's ICJO on the Home Evaluation form.

If denied, the workflow completes. If accepted, the Sending State's ICJO sends a Travel Packet to the Receiving State's ICJO.

When the juvenile transfer occurs, the Receiving State's ICJO will complete the workflow.

When completing the workflow upon juvenile transfer, two processes are initiated:

1) The **Maximum Parole/Probation Expiration Date Monitor**: This monitor looks at the Maximum Parole/Probation Expiration Date from the case's File Details and automatically generates an email to the Sending State's ICJO when that date passes, if the case is still active.
2) The **Quarterly Progress Report Monitor**: This monitor starts a counter which will send the Receiving State's ICJO office an alert at 75 and 90 calendar days to remind them to complete a Quarterly Progress Report, if the case is active, if they have not already. Upon receiving this alert, the Receiving State has the option to continue receiving the alert (which resets the timer and allows them to receive another alert 75 and 90 calendar days later) or cancel duplicate quarterly report alert. If the Receiving State does not choose to "continue" receiving notifications, they will not receive the next notification.

Quarterly Progress Report

The **Quarterly Progress Report** workflow allows for the Receiving State's ICJO to send a Quarterly Progress Report to the Sending State's ICJO. Based on the decision marked at the bottom of the Quarterly Progress Report form, the Sending State's ICJO will select either "Continue Supervision Checked on Quarterly Report" or "Request Discharge Checked on Quarterly Report."

- If "Continue Supervision" is selected, the workflow completes.
- If "Request Discharge" is selected, the Sending State's ICJO has 60 calendar days to respond to the Receiving State. On the 60th calendar day, the Sending State's ICJO will be sent a notification email to remind them that they need to respond. After responding, the Receiving State's ICJO will complete the workflow.

Expedited Req for TOS (Parole)

The **Expedited Req for TOS (Parole)** workflow allows for the Sending State's ICJO to request an expedited transfer of a juvenile from their state to the Receiving State. It begins with the Sending State submitting a Travel Permit to the Receiving State.

Next, the Receiving State's ICJO will approve or deny the request to expedite the transfer. ***NOTE: The Receiving State may deny the request to expedite the transfer of supervision case, but it cannot deny the transfer of supervision, according to Rule 4-104(4), if the juvenile has no custodial parent or legal guardian in the Sending State but does have a custodial parent or legal guardian in the Receiving State.*** If denied, the regular Request for Transfer of Supervision workflow begins. If accepted, the Sending State has 10 business days from the time the Travel Permit was submitted to submit the juvenile's referral packet to the Receiving State.

Once the Receiving State gets the Referral Packet, they will have their field officers complete a Home Evaluation, which will be sent back to the Sending State upon completion. When the juvenile transfer occurs, the Sending State's ICJO will complete the workflow.

When completing the workflow upon juvenile transfer, two processes are initiated:

1) The **Maximum Parole/Probation Expiration Date Monitor**: This monitor looks at the Maximum Parole/Probation Expiration Date from the case's File Details and automatically generates an email to the Sending State's ICJO when that date passes, if the case is still active.
2) The **Quarterly Progress Report Monitor**: This monitor starts a counter which will send the Receiving State's ICJO office an alert at 75 and 90 calendar days to remind them to complete a Quarterly Progress Report, if the case is active, if they have not already. Upon receiving this alert, the Receiving State has the option to continue receiving the alert (which resets the timer and allows them to receive another alert 75 and 90 calendar days later) or cancel duplicate quarterly report alert. If the Receiving State does not choose to "continue" receiving notifications, they will not receive the next notification.

Expedited Req for TOS (Sex Offender)

The **Expedited Req for TOS (Sex Offender)** workflow allows for the Sending State's ICJO to request an expedited transfer of a juvenile sex offender from their state to the Receiving State. It begins with the Sending State submitting a Travel Permit to the Receiving State.

Next, the Receiving State's ICJO will approve or deny the request to expedite the transfer. ***NOTE: The Receiving State may deny the request to expedite the transfer of supervision case, but it cannot deny the transfer of supervision, according to Rule 4-104(4), if the juvenile has no custodial parent or legal guardian in the Sending State but does have a custodial parent or legal guardian in the Receiving State.*** If denied, the regular Request for Transfer of Supervision workflow begins. If accepted, the Receiving State has 5 business days to submit reporting instructions/registration requirements. After

that, the Sending State has 10 business days from the time the Travel Permit was submitted to submit the juvenile's referral packet to the Receiving State.

Once the Receiving State gets the Referral Packet, they will have their field officers complete a Home Evaluation, which will be sent back to the Sending State upon completion. When the juvenile transfer occurs, the Sending State's ICJO will complete the workflow.

When completing the workflow upon juvenile transfer, two processes are initiated:

1) The **Maximum Parole/Probation Expiration Date Monitor**: This monitor looks at the Maximum Parole/Probation Expiration Date from the case's File Details and automatically generates an email to the Sending State's ICJO when that date passes, if the case is still active.
2) The **Quarterly Progress Report Monitor**: This monitor starts a counter which will send the Receiving State's ICJO office an alert at 75 and 90 calendar days to remind them to complete a Quarterly Progress Report, if the case is active, if they have not already. Upon receiving this alert, the Receiving State has the option to continue receiving the alert (which resets the timer and allows them to receive another alert 75 and 90 calendar days later) or cancel duplicate quarterly report alert. If the Receiving State does not choose to "continue" receiving notifications, they will not receive the next notification.

Travel Permit – Visit

The **Travel Permit – Visit** workflow allows for the Sending State's ICJO to send a Travel Permit (for Vacation/Visit) to the Receiving State's ICJO. If the permit is for less than 30 calendar days, the Receiving State's ICJO completes the workflow. If the permit is for more than 30 calendar days, the Receiving State's ICJO selects "Return to Sending State."

Next, the Sending State's ICJO has 30 calendar days to submit reporting instructions for the juvenile. On the 30th calendar day, the Sending State's ICJO receives an email to alert them that reporting instructions are due.

After they send the reporting instructions, the Receiving State's ICJO completes the workflow.

Travel Permit – Testing Placement

The **Travel Permit – Testing Placement** workflow allows for the Sending State's ICJO to send a Travel Permit (for Testing Placement) to the Receiving State's ICJO. If the permit is for less than 30 calendar days, the Receiving State's ICJO completes the workflow. If the permit is for more than 30 calendar days, the Receiving State's ICJO selects "Return to Sending State."

Next, the Sending State's ICJO has 30 calendar days to submit a referral packet for the juvenile. On the 30th calendar day, the Sending State's ICJO receives an email to alert them that the referral packet is due.

After they send the referral packet, the Receiving State's ICJO completes the workflow.

Travel Permit – RTF Notification

The **Travel Permit – RTF Notification** workflow allows for the Sending State's ICJO to alert the Receiving State's ICJO that a juvenile will has been placed in a residential facility in their state. Upon receipt of the notification, the Receiving State's ICJO completes the workflow.

Violation Report and Reply

The **Violation Report and Reply** workflow allows for the Receiving State's ICJO to send a Violation Report to the Sending State's ICJO. Based on the decision marked at the bottom of the Violation Report form, the Sending State's ICJO will select either "Continue Supervision Checked on Violation Report," "Request Revocation Checked on Violation Report," or "Request Discharge Checked on Violation Report."

- If "Continue Supervision" is selected, the workflow completes.
- If "Request Revocation" is selected, the Sending State's ICJO has 5 business days to process the request. On the 5th business day, the Sending State's ICJO will be sent a notification email to remind them that they need to take action. Then they send it back to the Receiving State's ICJO, who completes the workflow.
- If "Request Discharge" is selected, the Sending State's ICJO has 60 calendar days to respond to the Receiving State. On the 60th calendar day, the Sending State's ICJO will be sent a notification email to remind them that they need to respond. After responding, the Receiving State's ICJO will complete the workflow.

If the Sending State has not responded to the Receiving State within 10 business days of receiving the Violation Report by clicking on one of the workflow icons, the Sending State will receive an email reminder notification to respond to the Violation Report. The Step name on the Sending State's Global Assignment's page changes to "10 day due date passed."

When the Sending State clicks "Request Revocation," or "Request Discharge," the workflow moves into the new time frame associated with that action (see above). The Sending State will not receive the 10 day reminder email as the workflow has already moved forward into a new time frame.

Absconder Violation Report

The **Absconder Violation Report** workflow allows for the Receiving State's ICJO to alert the Sending State's ICJO that a juvenile transferred into their state has absconded. Upon receipt of the notification, the Sending State's ICJO has the option to complete the workflow, or send a warrant to the Receiving State. From there, the Receiving State completes the workflow. After 10 business days, the Receiving State ICJO may close the case for the juvenile via the "Case Closure – From Receiving State" workflow.

Case Closure from Sending State

The **Case Closure from Sending State** workflow allows for the Sending State's ICJO to alert the Receiving State's ICJO that the case has been closed for the juvenile. Upon receipt of the notification, the Receiving State's ICJO completes the workflow.

Case Closure from Receiving State

The **Case Closure from Receiving State** workflow allows for the Receiving State's ICJO to request that a case be closed for a juvenile who has transferred into their state.

The Sending State's ICJO has the option to either accept or reject this request, and the Receiving State's ICJO will receive an email notification to alert them of which option was chosen.

Return for Failed Placement

The **Return for Failed Placement** workflow allows for the Receiving State's ICJO to initiate the process for the return of a juvenile to their home state, whose placement has failed in the receiving state.

After the Receiving State's ICJO sends notice to the Sending State's ICJO, the Sending State's ICJO has 5 business days to send the Receiving State the Travel Plan for the juvenile. On the 5th business day, the Sending State's ICJO receives a notification that the Travel Plan is due. At this point, they have the option to send the Travel Plan or request a 5 business day extension.

When the Sending State's ICJO sends the Travel Plan to the Receiving State's ICJO, the Receiving State's ICJO gets an email notification.

When the juvenile is returned to the Sending State, the Sending State's ICJO completes the workflow.

Non-Voluntary Return

The **Non-Voluntary Return** workflow allows for the Home/Demanding State's ICJO to initiate the process for the return of a runaway juvenile to their home state.

After sending the request for the juvenile, the Holding State's ICJO has the option to approve or deny the request. If denied, the workflow completes. If approved, the Home/Demanding State's ICJO has 5 business days to send the Holding State the Travel Plan for the juvenile. On the 5th business day, the Home/Demanding State's ICJO receives a notification that the Travel Plan is due. At this point, they have the option to send the Travel Plan or request a 5 business day extension.

When the Home/Demanding State's ICJO sends the Travel Plan to the Holding State's ICJO, the Holding State's ICJO gets an email notification.

When the juvenile is returned to the Home/Demanding State, the Home/Demanding State's ICJO completes the workflow.

Voluntary Return

The **Voluntary Return** workflow allows for the Holding State's ICJO to initiate the process for the return of a runaway juvenile to their home state.

After the Holding State's ICJO sends notice to the Home/Demanding State's ICJO, the Home/Demanding State's ICJO has 5 business days to send the Holding State the Travel Plan for the juvenile. On the 5th business day, the Demanding State's ICJO receives a notification that the Travel Plan is due. At this point, they have the option to send the Travel Plan or request a 5 business day extension.

When the Home/Demanding State's ICJO sends the Travel Plan to the Holding State's ICJO, the Holding State's ICJO accepts it.

When the juvenile is returned to the Home/Demanding State, the Home/Demanding State's ICJO completes the workflow.

Communication Request

The **Communication Request** workflow allows an ICJO user to communicate using an ICJ form with another ICJO user in regards to a juvenile's case file. This form is stored with the file and therefore its contents are stored for future reference. This route allows for a maximum of four requests and responses.

Adhoc to Individual User

The **Adhoc to Individual User** workflow allows for communication between the ICJO and field officers (JPS and JPO users). This workflow can be used for notifications (ex. to let a JPO know when a juvenile will be visiting their state) or for sending documents that need to be completed (ex. a JPO fills out a Form IX and sends it to their JPS, who sends it to their ICJO in a Quarterly Progress Report workflow). This route is to be used for all correspondence outside of ICJO to ICJO communication.

Ad Hoc Routing

Uses of Ad Hoc Routing

Ad Hoc Routing allows for an ICJO to send documents to their field staff. This can be done for a variety of reasons, but its primary uses will be to notify field staff (ex. The receiving state ICJO ad hoc routing a Form VII to a JPS or JPO to alert them that a juvenile will be visiting their state) or to send a form to field staff for them to complete (ex. The receiving state ICJO ad hoc routing a Form VIII to a JPS or JPO so they can conduct a Home Evaluation for a juvenile).

How to Ad Hoc Route

Note: To Ad Hoc Route a document that is currently in another workflow on your Assignments page, please see the next section's instructions for "Ad Hoc Routing a Document Currently Assigned to You." The instructions in this section instruct on how to Ad Hoc Route a document that is not involved in another workflow.
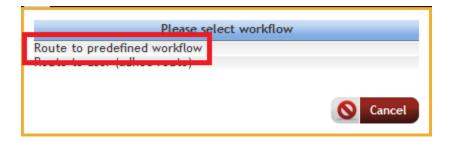
1. In the web viewer, select the **Workflow** icon.
    IMPORTANT: The document you choose will be the document that contains all of the workflow task buttons for the entire workflow route. It will also be the first document to load when a user it has been routed to opens the assignment.
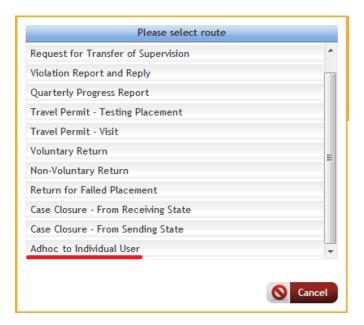
    Because of this, the document you select should be the e-form related to the information you need to convey to your field officers.
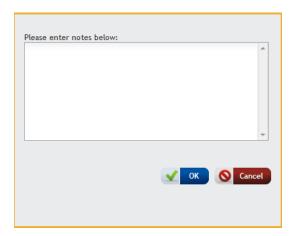
2. Select **Route to Predefined Workflow** from your options.
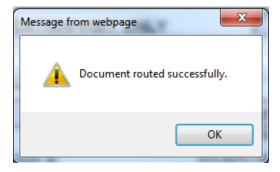
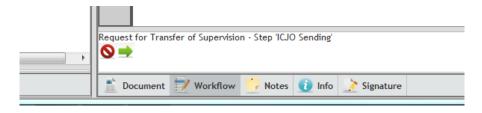3. Select **Ad Hoc To Individual User** from the list of workflows.

4. You will be prompted for notes, but none are necessary for this step. Click **OK**.

5. You will receive an alert that the document was routed successfully. Click **OK**.
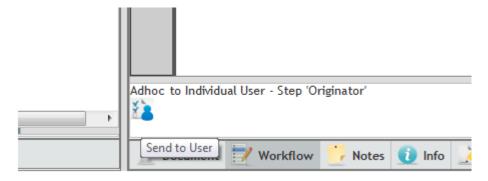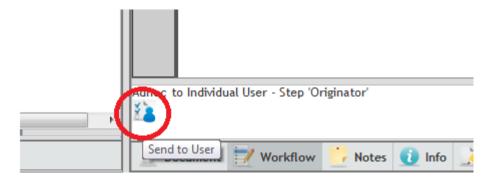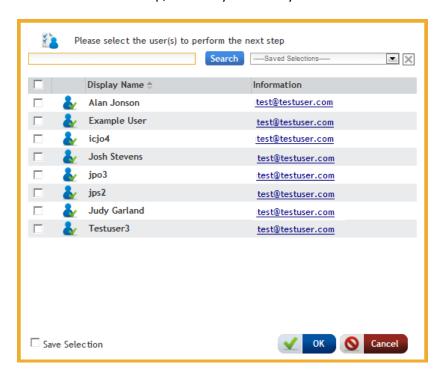

6. The page will refresh and you will have one button at the bottom of your viewer window. If you hover over it, it will say "Send to User."
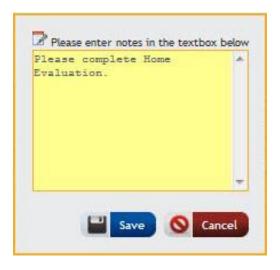
7. Click the **Send to User** button.

a. A list of users will show up, from only the state you work in.

b. Select a user from the list and click **OK**.
c. Enter any notes you would like the user you selected to see, and click **Save**.

d. Your window will refresh and the workflow task button will be removed, and the assignment will be off of your Assignments page.

Ad Hoc Routing a Document Currently Assigned to You
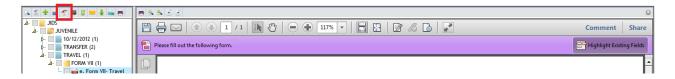
If you are assigned a document in workflow, and you want to ad hoc route that same document, how it displays may be slightly different than what is described in the **How To Ad Hoc Route** section.

The instructions in the **How To Ad Hoc Route** section **only** apply if:
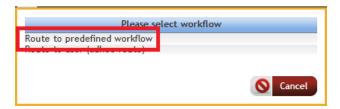
1) You are routing a different document located in the same file as the document sent to you in workflow.
   Example: A Form IA/VI is assigned to you via the Request for Transfer of Supervision workflow, and you want to generate and ad hoc route a Form VIII (Home Evaluation) to your field officer.
2) You select a workflow button and the assignment leaves your page, and *then* you ad hoc route that document.
   Example: You receive a Form X (Case Closure Notification) via the Case Closure-From Sending State workflow. You select the "Complete" workflow button from your options. After the page refreshes and the workflow buttons disappear, you ad hoc route the Form X to your field officer to let them know the case is closed.

If you want to ad hoc route a document that currently is assigned to you in another workflow, you must do the following:

1. In the web viewer, select the **Workflow** icon.
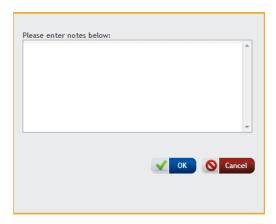
2. Select **Route to Predefined Workflow** from your options.
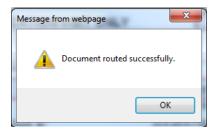
3. Select **Ad Hoc To Individual User** from the list of workflows.

4. You will be prompted for notes, but none are necessary for this step. Click **OK**.

5. You will receive an alert that the document was routed successfully. Click **OK**.
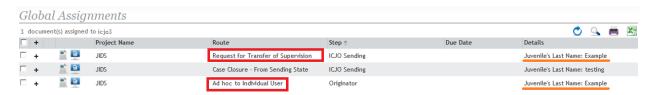
6. The page will refresh. You will see the workflow buttons on the bottom of your page for the other workflow that document is currently in.

Note: The above image is an example of what you may see at this point. Depending on what step and what workflow you are in, the buttons that display at this time may be different.
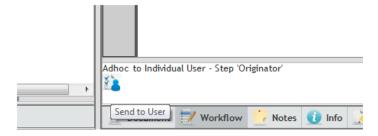
> a. If there are multiple workflows assigned to you on the same document, the oldest of the workflows will display by default.
> b. In order to see the workflow button that allows you to select which user you would like to ad hoc route to, you need to close the web viewer.

7. Go to your **Assignments** page.
> a. Notice that your juvenile is listed twice, under unique workflow routes.
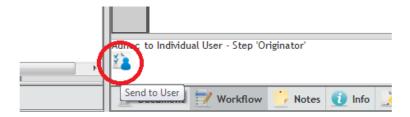
> b. Select the **Web Viewer** icon for the **<u>Ad hoc to Individual User</u>** assignment.
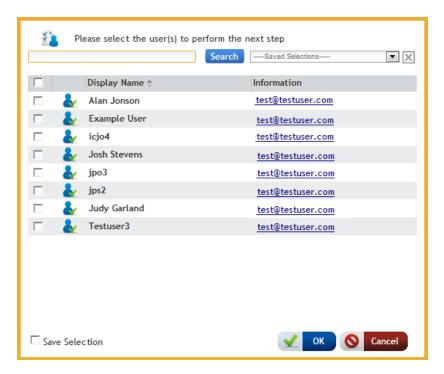
8. Your web viewer will open and the Ad Hoc workflow button will appear. If you hover over it, it will say "Send to User."

9. Click the **Send to User** button.

a. A list of users will show up, from only the state you work in.

b. Select a user from the list and click **OK**.
c. Enter any notes you would like the user you selected to see, and click **Save**.

d. Your window will refresh. After the page loads, you will see the workflow task buttons from the other assignment currently on that document. If you return to your Assignments page, you will see that the Ad Hoc Route assignment has been removed.

Global Assignments

2 document(s) assigned to icjo3

	+		Project Name	Route	Step ⬦	Due Date	Details
☐	+		JIDS	Request for Transfer of Supervision	ICJO Sending		Juvenile's Last Name: Example
☐	+		JIDS	Case Closure - From Sending State	ICJO Sending		Juvenile's Last Name: testing

Note: The item that was routed to you from the other state will remain on your Assignments page. Only the Ad Hoc assignment to your field staff should be removed from your Assignments Page at this time.

Email Notifications

Users will receive email notifications in the JIDS system when the following events occur:

- An item has been routed to the user/their state to work.
- A deadline has occurred for an item that has been routed to the user/their state.

Notification emails contain a variety of information about what was sent to you, the juvenile file it is in relation to, and who routed it to you. An example of what one of these emails looks like is below.

Request for Travel Permit (Visit) has been submitted

user@testuser.com
Sent: Thu 10/11/2012 4:23 PM
To: you@youremail.com

This email is a notification that a travel permit (visit) has been submitted.
Please follow the link below to log into JIDS for more information.

Juvenile's First Name: FRANK
Juvenile's Last Name: FAILURE
DOB: 09/03/2012
Status: Probation
Type: Transfer
JIDS #: 79
Routed By: user@testuser.com
File Link: http://jids.juvenilecompact.org/FB6//FileDetail.aspx?
ProjectID=1&FileID=170
Document Link: http://jids.juvenilecompact.org/FB6//output/Viewer.ashx?
ProjectID=1&FileID=170&DocumentID=4342
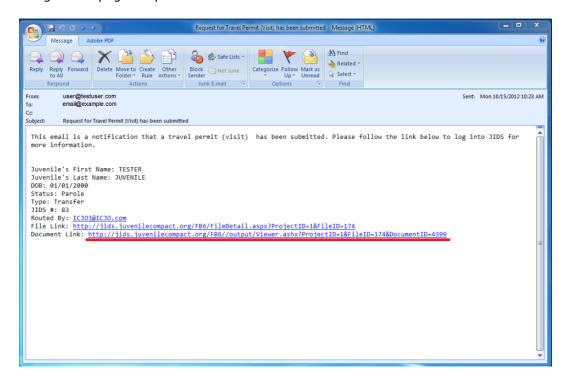
- Selecting the **File Link** will bring you to the File Details page for the juvenile file.
- Selecting the **Document Link** will launch the web viewer and bring you to the exact document that has been routed to you to work.

IMPORTANT: You must be logged out of JIDS if you want to select one of these links. If you are logged into JIDS when you receive a notification email, go to your Assignments page to view the document routed to you. Do not click on the email link.
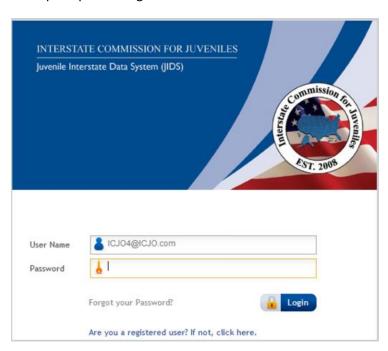
Replying to a Request

1. After receiving an email notification that a document has been routed to your state to work, select the **Document Link** in the email.
   Note: Only select the document link if you are logged <u>out</u> of JIDS. If you are logged in, go to your Assignments page to open the document in the web viewer.
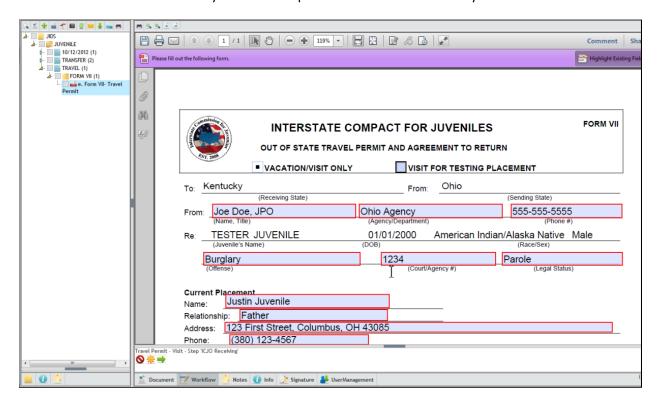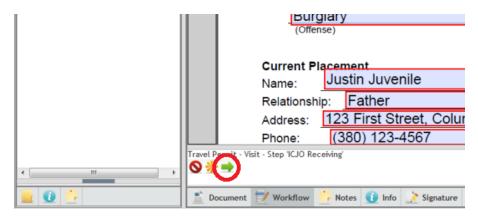
   a. You will be prompted to log in.

b. After logging in, you will be taken to the juvenile's File Details page, and the web viewer will automatically launch and open the document routed to you.

2. After reviewing the form, select the appropriate workflow task button for your situation.

3. Enter any notes you would like the next user in the workflow to see. Click **Save**.

a. The window will refresh. The task buttons will be removed from your web viewer and the assignment will no longer be present on your Assignments page.

Cancelling a Workflow
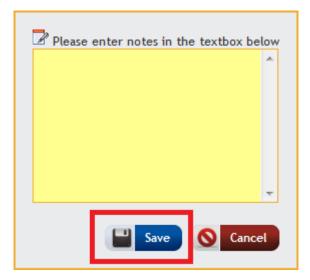
In some cases, a user will need to cancel a workflow. This could be because the document was accidentally routed twice, the initiating user selected the wrong workflow, or the juvenile no longer plans to cross state lines, among other possible scenarios.

If you need to cancel a workflow route for any reason, you may do so at any step of the workflow that is assigned to you. Each step in a workflow contains a Cancel Workflow button in addition to the other task buttons unique to that particular workflow route.

1. To cancel a workflow, select the **Cancel Workflow** button (⛔).

2. You will be prompted for notes, but there is no need to include any. Click **Save**.

3. Your window will refresh and the task buttons will be removed from your page. The assignment will no longer display on your Assignments page.
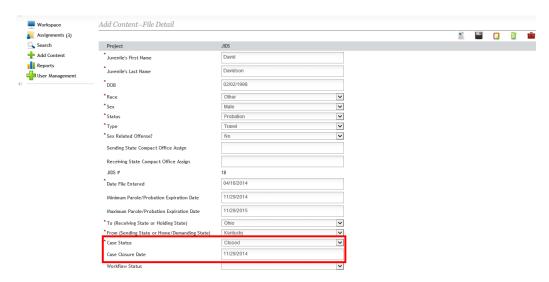
Closing a Case/Reopening a Case

Closing a Case
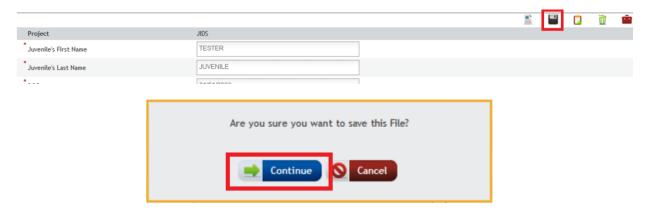
To close a case:

1. On the juvenile's File Details page, change the **Case Status** from "Active" to "Closed."
2. Enter the current date in the **Case Closure Date** field.
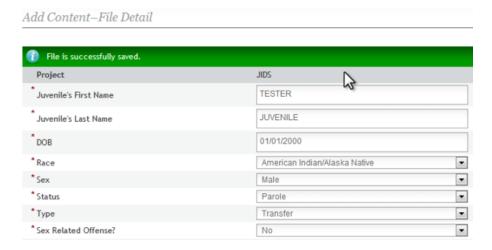
Note: if you utilize either of the Case Closure workflows, the workflows will automatically update both of these fields for you. In the Return for Failed Placement workflow, your Case Status field will be updated, but you will have to enter in the Case Closure Date manually.

3. Click the **Save** icon at the top of the window to save your changes, and select **Continue**.

4. A green banner will appear at the top of your page to let you know your changes were saved.

Reopening a Case

To reopen a case:

1. On the juvenile's File Details page, change the **Case Status** from "Closed" to "Active."
2. Remove the date in the **Case Closure Date** field.
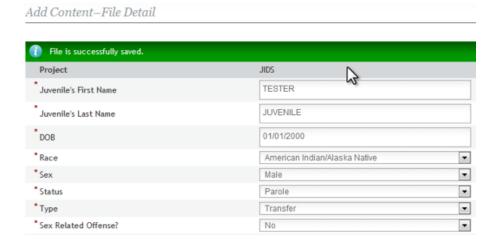
3. Click the **Save** icon at the top of the window to save your changes, and select **Continue**.

4. A green banner will appear at the top of your page to let you know your changes were saved.
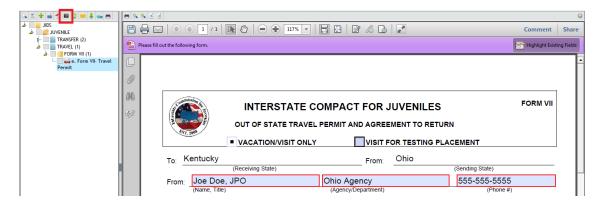
Sending a Communication Request

The **Communication Request** workflow allows an ICJO user to communicate using an ICJ form with another ICJO user in regards to a juvenile's case file. This form is stored with the file and therefore its contents are stored for future reference. This route allows for a maximum of four requests and responses.
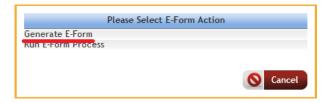
Note: Communication Requests can only be sent between ICJO users.

To generate the Communication Request E-form:

1. In the document web viewer, select the Generate E-form button ( ) in your top navigation.
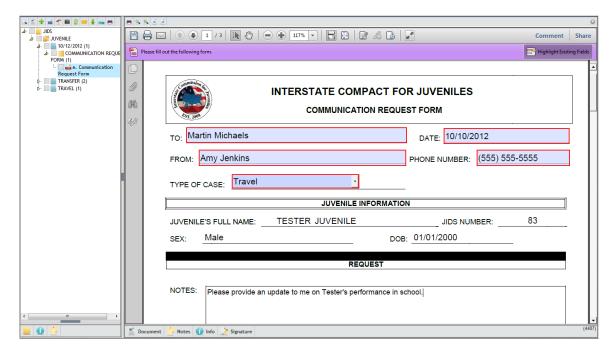
    a. Select **Generate E-form** from your options.

    b. Select **Communication Request Form** from the list of forms.

2. Fill out the required fields on the form and enter your request.

a. Scroll to the bottom of your form and click **Save (** Save **)**.
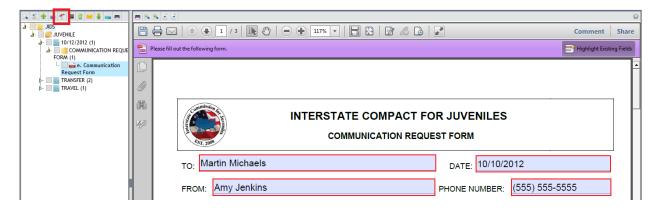
b. The page will refresh and the information you entered on the form will be stored in JIDS.

To route the e-form down the Communication Request workflow:
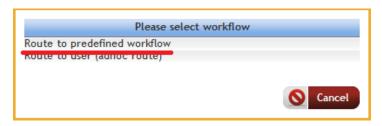
1. Select the document you want to route. In this case it will be the **Communication Request E-form**.

IMPORTANT: The document you choose will be the document that contains all of the workflow task buttons for the entire workflow route. It will also be the first document to load when a user it has been routed to opens the assignment.
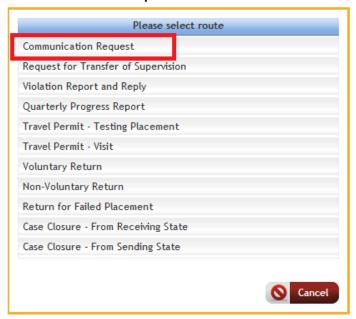
2. Click the **Workflow** icon ( ) in the top navigation.

a. Select **Route to Predefined Workflow** from your options.
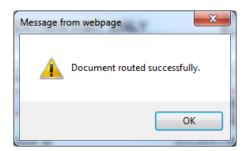
b. Select the **Communication Request** workflow.
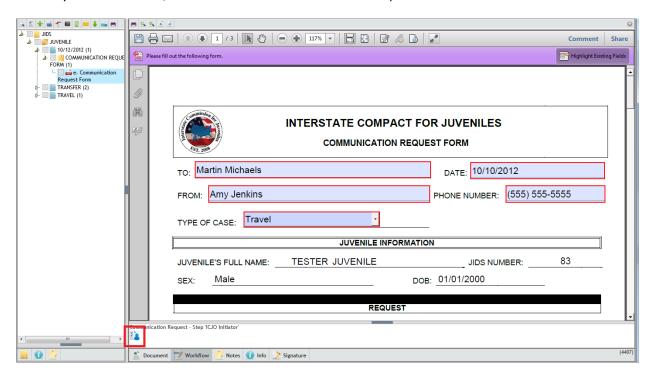
c. You will be prompted for notes, but there is no need to enter any. Click **OK**.
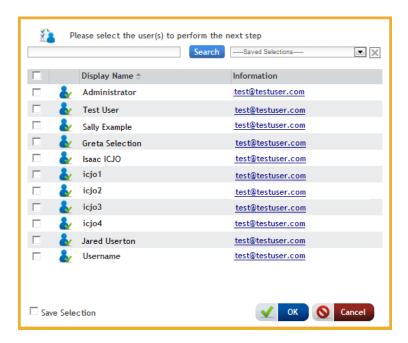
d. You will receive a notification that the document was routed successfully.

3. When the page refreshes, you will have a task button at the bottom of your viewer window. If you hover over it, it is called "Send Communication Request."

a. Select the **Send Communication Request** button.

b. When selected, a list of users will come up. Choose the user you would like to communicate with and click **OK**.
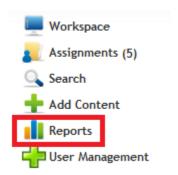
Your page will refresh and the item will have successfully sent to the user you chose. The task buttons previously on the bottom of your viewer window will be removed.

Running Reports

JIDS Custom Reports

To run a report:

1. Select the **Reports** icon on the left hand navigation.

2. Select **JIDS Custom Reports** from your options.

3. A new window will launch containing a list of reports.

4. Click the plus icon ( ) to the left of a report to view a description of the report.
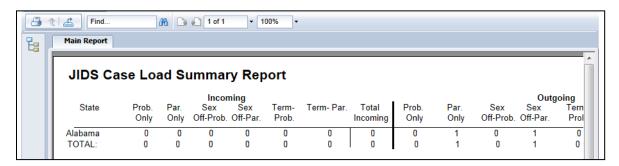
a. Click the minus icon (⊖) to minimize the description.
5. To choose a report, click its name.
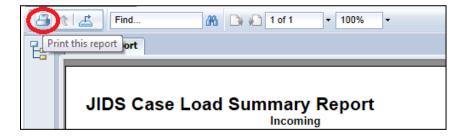
6. Enter the required parameters at the top of the report, and click **Display Report**.

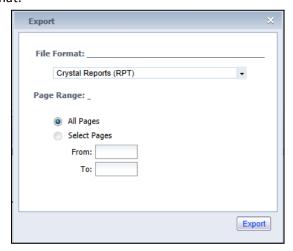a. Your results will appear in the report below the parameters.

7. To print a report, select the print icon in the top left corner of the report window.

8. To export a report, select the export icon at the top of your report window.

a. A screen will come up, allowing you to choose the file format and page range of the report you are exporting. We recommend you use PDF or Microsoft Excel (97-2003) as the file format.

b. From the drop down, select "PDF" for file type, and leave the page range at All Pages.
c. Click **Export**.
d. The PDF of the report should open, and you will be able to save it to your computer.

Audit Reports

JIDS allows ICJO users to run audit reports. The primary types of audit reports are Workflow Activity Reports, Workflow Status Report, and File Activity Reports.
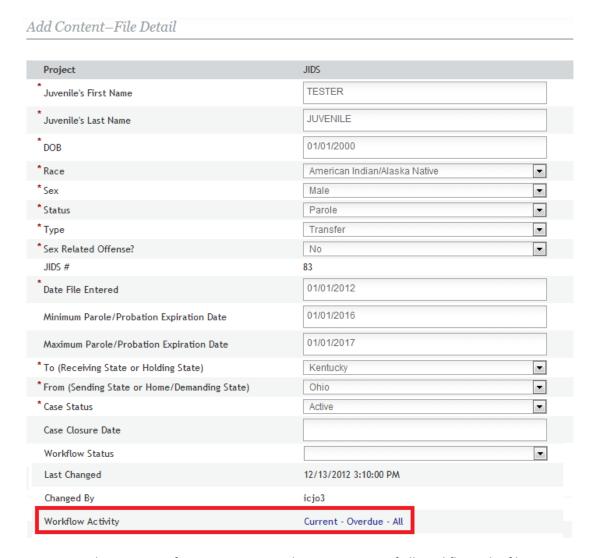
The Workflow Activity Report shows the current or past steps that a juvenile file's document(s) have followed throughout its workflow lifecycle.

The Workflow Status Report provides activity of multiple files within a specific workflow route.

The File Activity Report shows the type of activity performed by a user or all users on an individual file within a specified date range.
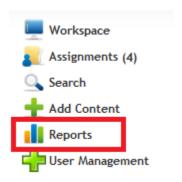
Workflow Activity Report

1. Go to the File Details page of the juvenile file you want to view the Workflow Activity of.
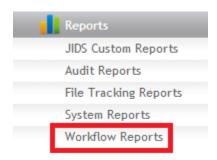2. At the bottom of the juvenile's file details, there is a "Workflow Activity" row.

Add Content—File Detail

Project	JIDS
* Juvenile's First Name	TESTER
* Juvenile's Last Name	JUVENILE
* DOB	01/01/2000
* Race	American Indian/Alaska Native
* Sex	Male
* Status	Parole
* Type	Transfer
* Sex Related Offense?	No
JIDS #	83
* Date File Entered	01/01/2012
Minimum Parole/Probation Expiration Date	01/01/2016
Maximum Parole/Probation Expiration Date	01/01/2017
* To (Receiving State or Holding State)	Kentucky
* From (Sending State or Home/Demanding State)	Ohio
* Case Status	Active
Case Closure Date	
Workflow Status	
Last Changed	12/13/2012 3:10:00 PM
Changed By	icjo3
Workflow Activity	Current - Overdue - All

   a. Select **Current** if you want to view the current step of all workflows the file is in.
   b. Select **All** if you want to view every step of every workflow the file is/was in.

Workflow Status Report

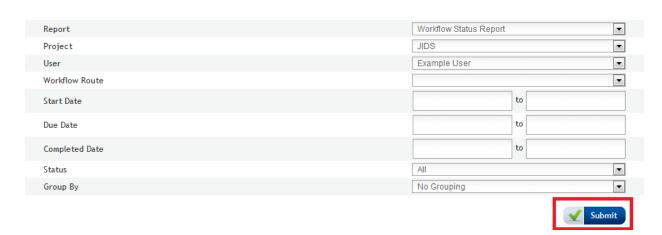1. Select the **Reports** button on your left hand navigation.

2. Select **Workflow Reports** from your list of options.

3. The Workflow Reports page defaults on the Workflow Status Report. Fill out the fields of the workflow you would like to view the status of.
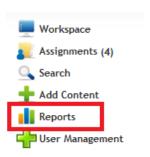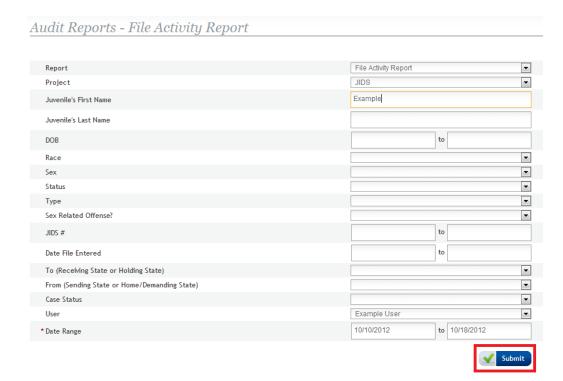   a. Enter in a User if you would like the specific workflow information for.

Workflow Reports - Workflow Status Report

4. The page will refresh and the results of your report will be displayed.

File Activity Report

1. Select the **Reports** button on your left hand navigation.

2. Select **Audit Reports** from your list of options.

3. The Audit Reports page defaults on the File Activity Report. Fill out the fields of the file you would like to view the activity for.
    a. Enter in a User if you would like to view the specific file activity of a certain user.
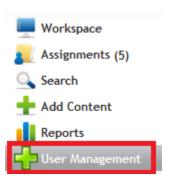   b. Enter a date range you would like to view the results for.
    c. Click **Submit**.

4. The page will refresh and the results of your report will be displayed.

Managing Users

The State Compact Offices are responsible for managing all of the users (ICJO, JPS, and JPO) within their state.

Adding Users

1. Select the User Management button on your left hand navigation.

2. You will be brought to the **Add User Information** page.

3. Fill in the information for your new user, and click **Save User Info**. Do **NOT** check the "Add/Edit Toggle" box to add a new user.
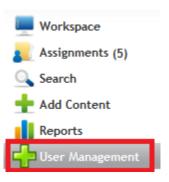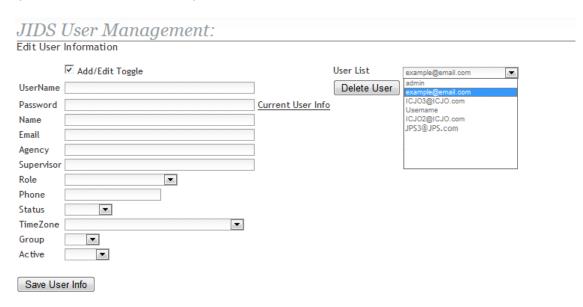
JIDS User Management:

Add User Information

a. The page will refresh and you will be taken back to your home screen.

Editing/Deactivating Users

Editing Users

1. Select the **User Management** button on your left hand navigation.

2. You will be brought to the **Add User Information** page. Select the check box next to **Add/Edit Toggle** to switch to the **Edit User Information** page.
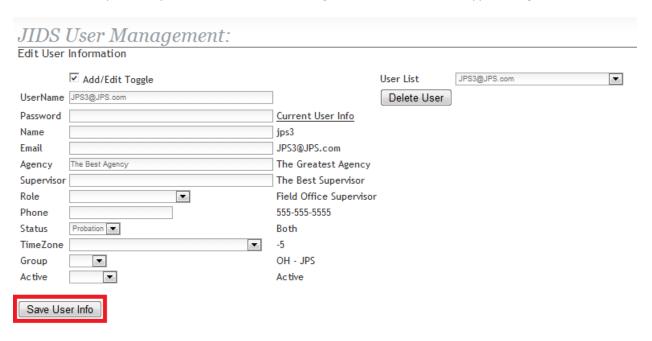
3. A user list will appear on your screen to the right of the User Information fields. Select the user you wish to edit from the drop down list.

4. After selecting the user, click in any of the empty fields. The selected user's current user information will appear to the right of the User Information fields.

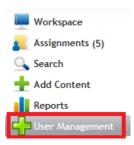*JIDS User Management:*

Edit User Information

a. Make any changes and click **Save User Info**.
   Note: You only need to enter information in the fields you wish to change. Information previously saved which has not changed does not need to be typed in again.

JIDS User Management:

Edit User Information

b. The page will refresh and you will be taken back to your home screen.

Deactivating Users

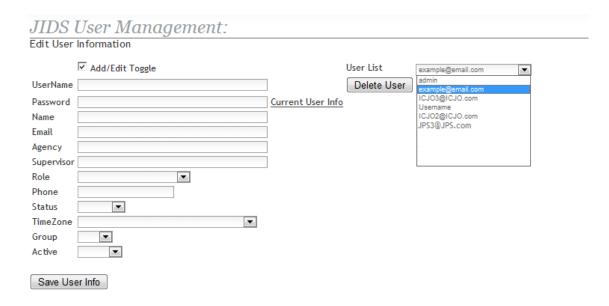1. Select the **User Management** button on your left hand navigation.

2. You will be brought to the **Add User Information** page. Select the check box next to **Add/Edit Toggle** to switch to the **Edit User Information** page.
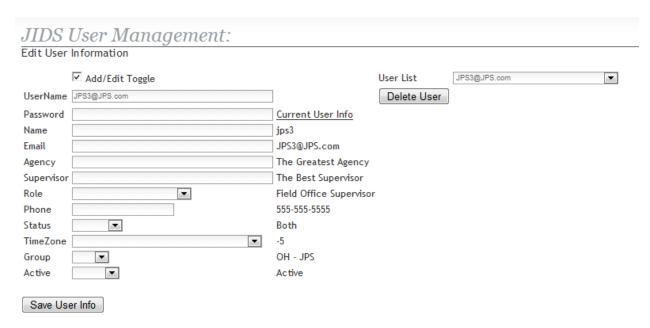

3. A user list will appear on your screen to the right of the User Information fields. Select the user you wish to deactivate from the drop down list.

   Note: Please do not delete JIDS users. Workflows currently in progress can be affected, and the Workflow Status Report can return blank results if a user involved in the workflow is deleted.

JIDS User Management:
Edit User Information

4. After selecting the user, click in any of the empty fields. The selected user's current user information will appear to the right of the User Information fields.
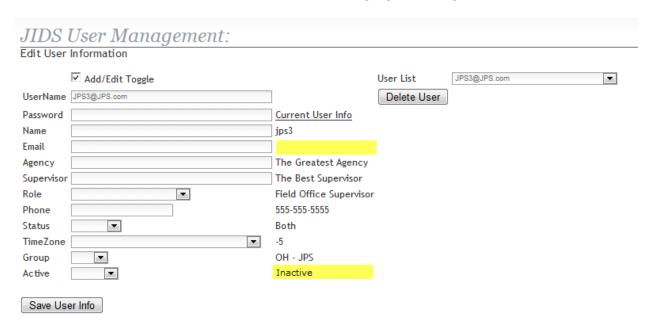

JIDS User Management:
Edit User Information

a. Put the cursor in the **Email** field and add a blank space. This removes their email from JIDS and they will no longer receive JIDS notifications.
b. Select the **Active** drop-down menu and select "Inactive."
c. Click "Save User Info"

d. The page will refresh and you will be taken back to your home screen.

5. To ensure your changes were made, open User Management again, click the "Add/Edit Toggle" and locate the user from the User List. Note the highlighted changes:

6. Contact the JIDS Helpdesk at support@juvenilecompact.org to have this user removed from the JIDS **Group** (ICJO, JPS, or JPO), so the user will not be included in any new workflows.

Accessing JIDS Help

JIDS Help can be accessed by going to https://support.juvenilecompact.org or clicking the **Help** icon in JIDS. You can email the helpdesk directly at support@juvenilecompact.org.